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Introduction to Banner

The Banner system is our database system for managing almost every aspect of operations here at City College. Banner keeps records on everything from student registration and academic history, course and section information, departmental budgets, payroll, financial aid, and more.

There are a variety of ways that information stored in Banner is accessed:

- Some information is extracted automatically from Banner and published, either on paper or, more commonly, online. A good example of this is the online version of the time schedule, which is generated automatically from the schedule information in Banner.
- The Web4 system provides a means to both retrieve and update information in Banner. For example:
  - Students use Web4 to register for classes.
  - City College employees can use Web4 to enter timesheet information or check their pay stubs.
  - Faculty can use Web4 to check class lists, and enter midterm and final grades.
  - Department Chairs can use Web4 to review the class list of any class in their department, or any of their faculty members.
  - Everyone affiliated with City College can use Web4 to update their contact information.
- Finally, certain City College employees can use Banner Forms to retrieve and input information into Banner.

This document is primarily concerned with the ways academic department chairs, and their support personnel, can use Banner Forms to access information. Where appropriate, this document will also describe ways for department chairs to access the same information using other methods.
Accessing Banner

Accounts

In order to access Banner forms, you must have a Banner account. This account is established separately from other computer-related accounts you have at City College. You can request an account by filling out the “ITS Account Request Form”. Copies of this form are available from the Technology Learning Center, Batmale 311, or by calling the Help Desk at 239-3711.

When you receive Banner access, you will get a copy of this form. Your Banner Login ID will be the same as the other login ID’s you have at City College. The back of this form lists information about your initial Banner password.

INB System

City College personnel access the Banner system by accessing one of our INB servers using a web browser, such as Internet Explorer. (INB stands for Internet Native Banner). To start, go to the following URL:

http://www.ccsf.edu/banner/INB

You will see links to each of our two INB servers, along with the number of people currently logged in to each. To help balance load, choose the server with the smaller load.

Logging In

After following one of the INB links, you will be prompted to enter your Banner login ID and password (pictured at right). Your login ID and initial password are specified on the copy of the Account Request Form that you got back from ITS. Leave the Database field blank.
Forgotten Passwords

If you have forgotten your Banner password, contact the help desk at 239-3711.

Banner Interface

The Banner Interface, pictured on the next page, consists of several different elements:

- The **menu bar** is at the top, and is similar to the menu bar in other applications. There is a file menu, an options menu, a help menu, and several others.
- Below the menu bar is a **toolbar**, containing shortcuts to various menu bar options.
- Below the toolbar is a box labeled “**Go To…**”, which you can use to navigate directly to a Banner form.
- When you first log into Banner, the **Banner Main Menu** occupies the main area of the window. When you go to an individual Banner form, this area is replaced with the contents of that form.
  - The individual Banner forms are grouped into folders, based on function. Most of the forms that are relevant to academic department chairs are available under the “Student Department Chair Query Menu”. To reveal or hide the contents of a folder, double-click on it.
  - To access an individual form, double-click on its name, or enter its abbreviated name in the “**Go To…”** box at the top of the window. An example of an abbreviated name is SFASLST. Abbreviated names for the forms described in this document are listed throughout.
- The very bottom of the window contains a **status bar**. You can find status messages or error messages about the forms you are accessing in this space.
Getting Around Banner

Opening and Closing Forms
As mentioned above, you can navigate to an individual Banner form by either finding it in the main menu and double-clicking on it, or by entering its abbreviated name in the “Go To…” box.

When you are done with a form, you can click on the close button to return to the main menu. The close button is the button with the big X on the right side of the toolbar.

If you’d like to go directly to another form, there’s no need to return to the main menu. You can enter the name of another Banner form in the “Go To…” box at the top of the screen. In addition, you can use the up and down arrow keys while in the “Go To…” box to refer to forms you have used in your current Banner session (similar to using the back and forward buttons in a web browser).

Maneuvering within Blocks in a Form
Many of the forms in Banner are broken up into two or more blocks. For example, the form that you can use to access a class list has two blocks:

- The upper block allows you to enter information about the section you’d like to access
- The lower block contains the list of registered students for that section

After filling in the information in the upper block for the section you’re interested in, use the one of these options to retrieve the list of students:

- Block, Next menu option
- Next Block toolbar button
- Control-Page Down keyboard shortcut

If you’d like to get the list of students in a different section, use one of these options to clear out the form and start over:

- File, Rollback menu option
- Rollback toolbar button
- Shift-F7 keyboard shortcut

Whether you choose to use menu options, toolbar buttons, or keyboard shortcuts for any of the various Banner operations is up to you.

The Options Menu
Some of the forms in Banner have several different parts. For example, when you look up information about a student’s academic history, there’s a section that describes the student’s overall academic history, and another section that gives the student’s coursework term by term.
The Options menu will have an entry for each part of one of these types of forms. You can switch between these parts by selecting different entries in the Options menu.

**Tabbed Interface**
A new feature in some Banner forms is a tabbed interface. Rather than using the Options menu to select different parts of a form, the form has a series of tabs running horizontally across the top of the form. Click on a tab to reveal its information.

**Search Forms**
Some forms are designed to allow you to search for values. For example, the Person Search form lets you enter in a person’s first and last name, and then finds all people in Banner with a matching name.

To use a form like this, use the mouse or tab key to select different fields, and type in the values you know. When you’ve entered everything you know, use one of the following methods to perform the search:

- The Query, Execute menu option
- The Execute query toolbar button
- The keyboard shortcut F8

You can use any of the following options to clear the form and perform another search:

- File, Rollback menu option
- Rollback toolbar button
- Shift-F7 keyboard shortcut

Often, you can use the percent sign as a wildcard while searching. For example, if you enter the value ‘Lau%’ (without the quotes) for a person’s last name in the Person Search form, it will find every person whose last name starts with Lau.
Searching for Values to Put Into a Field

If the field you are attempting to fill in has a downward-pointing triangle, you are able to search for appropriate values in this field by clicking on that triangle. The type of window that will appear depends on the field in question:

- If the number of different values that can be filled in is fairly small, you’ll get a window with a list of those values, along with some text explanation. For example, clicking on the downward-pointing triangle on a Term field brings up the window shown at right. You can scroll through this list, or use the Find feature to find an entry in this list. The Find feature uses the same percent sign wildcard as discussed above.

- In some instances, you’ll be brought to a new form that you can use to search for a value. For example, if you click on the downward-pointing triangle next to a CRN field, you’ll be brought to a page you can use to search for CRN’s. Use that form to find the CRN in question, then double-click on that CRN to go back to the original form. The CRN you double-click will be filled in automatically.

Printing

Printing the current screen

To get a printout of the current Banner screen to your local printer, use one of the following options:

- File, Print menu option
- Print toolbar button
- Shift-F8 keyboard shortcut

Reports

Banner reports are hard copy printouts of information extracted from Banner. The information displayed by these reports is defined by the Banner group in ITS. All Banner reports use a common form containing four sections:

1. The report being printed
2. The name of the printer
3. Parameters for the report
4. A section used to save the current settings and generate the report

The two sections you’ll be most interested in are sections 2 and 3.
In section 2 you specify the printer used to print the report. In general, Banner reports can only be printed on certain printers on campus. You can use the downward-pointing triangle to find a nearby printer. If you have a networked printer in your area, you can fill out a “Request for Adding Banner Network Printers” form to get it added as a Banner printer. This form is available from Anne Morris (amorris@ccsf.edu).

Section 3 is where you’ll specify parameters for the report. For example, if you are generating a printed class list for a section, you’ll need to specify the term and CRN for the section. You can get some hints about different values to enter at the bottom of the parameters section.

The Advanced Banner section of this document describes a way you can view and print a Banner report on any printer.

**Term Codes**

Many of the Banner forms that department chairs use ask for a term. For example, the class list for a particular CRN depends on whether you’re looking for Fall 2006 or Fall 2005.

Term codes are six-digit sequences. The first four digits are the year, and the next two digits identify the term for that year. For example, the term code 200670 is used to refer to credit course information in the Fall 2006 semester. The table below lists two-digit codes and their meanings.

<table>
<thead>
<tr>
<th>Term</th>
<th>Credit</th>
<th>Non-Credit</th>
<th>Int’l Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring</td>
<td>30</td>
<td>31</td>
<td>39</td>
</tr>
<tr>
<td>Summer</td>
<td>50</td>
<td>51</td>
<td>59</td>
</tr>
<tr>
<td>Fall</td>
<td>70</td>
<td>71</td>
<td>79</td>
</tr>
</tbody>
</table>

**Permissions**

As academic department chairs, you will have access to some Banner forms, but not all of them. Furthermore, you will have the ability to extract information from Banner, but not insert, update, or delete information. If you try to access a form that you do not have permission to access, you will get an error message. If you think you should have permission to the form, contact the Help Desk at 239-3711.

**Logging Out of Banner**

When you are done with your Banner session, you should log out before closing your web browser. Log out by clicking on the close button until you return to the main menu, then click on the close button one more time. You can also choose the File, Exit Banner menu option from any form.
Information about Anyone

How can I find out contact information for a person (phone, mailing address, email)?

To find out information about a person, fill in their ID (W or @ number), and then use Next Block.

Ways of finding out an ID Number

If you do not know the person’s ID, you can try filling in their name in the Name block. Enter the last name, followed by a comma, followed by the first name, then hit return. If more than one person matches, you’ll get a selection list of matching names.

If you don’t know the person’s ID and the above technique doesn’t work well enough for you, click on the downward pointing triangle to open up the Person Search form (SOAIDEN). You can then enter as much information as you know – last name, first name, etc., then use Execute Query to search. Double-click on the ID number of the person that you want.

- You can use the percent sign as a wildcard in this search. For example, entering ‘Lau%’ in the last name field (without the quotes) will find everyone whose last name starts with ‘Lau’
- The search is not case sensitive
- The search will also reveal birth dates, which can be helpful in resolving duplicate names.
Student Information

How can I find out a student’s current classes?

In this form you need to fill out the student’s ID and the term. If you do not know the student’s ID, you can use the same techniques used when finding contact information.

Move down to the lower block to find the courses the student is registered for in the selected term. For each course, you will also be able to find out the following:

- CRN
- Subject and Course
- Section
- Meeting days, times, and location
- Starting and Ending Dates
- Instructor
- Grading method
- Stars

If the student is not registered for classes for the selected term, you will get an error message in the status bar.

This form also displays the student’s total credit hours for the selected term.

You can also use SHACRSE to get an abbreviated listing of a student’s schedule.

How can I find out if a student has holds on their records?

A student with holds on their record cannot register for classes. Fill in the ID of the student into this form to find out if they have any holds. You can also find out which office issued the hold, and some basic information.

How can I get a student’s placement test scores?

Use this form to see a students matriculation placement exam scores for English, ESL, and/or Math. Both raw placement exam scores and the course they place into are entered. Contact the Matriculation Office for more information about the notations used in this form.
How can get a student’s academic history?

This form will give you a student’s academic history. You need to provide the student’s ID, the first term to consider, and the level. Enter 01 in level for credit classes; enter 02 for non-credit.

SHATERM will not show the current term. Use SFAREGQ or SHACRSE to find the student’s current classes.

To get the entire academic history, enter 000000 as the start term.

Can I find out the student’s academic history in just one area?

SHASUBJ is similar to SHATERM, but also allows you to enter a particular subject. This can be helpful when working with Late Adds or the Petition for Course Repetition, or anytime you want to limit the academic history to just one subject area.

Can I verify a student’s claim that they attempted to register for a class?

Banner keeps track of all events related to a student’s registration for a particular term – every course they ever tried to register for, whether the student was dropped, the methods by which the student was dropped, etc. The registration audit form lets you examine the entire registration record for a student.

This form will display every action related to registration. As such, you will see several entries for each attempt to register for a course online, as that request works its way through the Banner system. For more information about deciphering this form, contact Admissions and Records.
Course and Section Information

How do I get a class list for a section?

In the top part of this form, fill in the term code and CRN of the course. The bottom part of this form will list the following:

- Registration Order
- Student Name and ID
- Midterm Grade
- Final Grade
- Registration Status

Looking up a CRN

If you do not know the CRN for the course, you can click on the downward-pointing triangle to look it up. In the resulting page, enter the CRN, subject, course, then use one of the Execute Query options to search. You can also enter a section number to narrow your search. Double-click on the desired CRN to return to the previous screen.

Registration Codes

This list will show all students who had ever registered for the course, even if they drop or withdraw. The registration status is a two-letter code that indicates their status. Here are some of the more common codes:

<table>
<thead>
<tr>
<th>Code</th>
<th>Meaning</th>
<th>Code</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>RE</td>
<td>Registered</td>
<td>WL</td>
<td>Wait Listed</td>
</tr>
<tr>
<td>DR</td>
<td>Dropped, full refund</td>
<td>DP</td>
<td>Drop, no refund</td>
</tr>
<tr>
<td>DG</td>
<td>Drop with W</td>
<td>DW</td>
<td>Drop with W (non-credit)</td>
</tr>
<tr>
<td>DD</td>
<td>Drop/removed</td>
<td>DC</td>
<td>Cancel class</td>
</tr>
</tbody>
</table>

How do I get a printed class list for a section?

For this report you’ll need to fill in the following:

- Term (item #2)
- CRN (item #6)

You can also use this form to print student addresses and telephone numbers. This can be helpful when canceling a section. To get addresses and phone numbers, enter Y for parameter #15.

You can print out class lists for multiple CRN’s.

- Navigate down to the CRN parameter (#6) and fill in the first CRN
- Use the F6 button to add a new parameter row (or use the Insert Record toolbar button, or Record, Insert menu option)
- Fill in 6 in the first column, then tab over and fill in the next CRN. Repeat these two steps as necessary
• Print your report.

**How can I get an overall enrollment report for my department?**

There are three parameters in this form:

- Term
- Department
- Totals Wanted (answer Y or N)

This report gives the following information for every section in the selected department:

- Scheduling information (subject, course, section, days, times, dates, instructor, etc.)
- Current enrollment (column labeled ENR)
- Census 1 enrollment (column labeled C1)
- Capacity (CAP) and Remaining Seats (REM)
- WSCH

If you choose to print totals, a final sheet will be printed that totals enrollment and WSCH, with breakout information for daytime, evening, and weekend classes.

**Is there a shorter, online way for me to check schedule and enrollment information?**

This form works much like the Person Search Form – you can enter as much or as little about sections, and get schedule and enrollment information. Enter information in one or more of the following areas:

- Term
- Subject
- Course
Faculty Information

How can I check an instructor’s load?

Use this form to check an instructor’s schedule, and the amount of load that an instructor has. For load, the value to check for each course is FTE. Full-timers teaching a section for extra pay will have the value “PX” in the Contract Type field for the section.

Contact the Scheduling Office for a further discussion of faculty load.
Budget Information

How can I check my overall budget?

This form allows you to check budget information. Provide the following information:

- Organization number
- Fund (use U for general funds)
- Account (optional; use 4000 for just supplies, 5000 for just equipment?)

When you use next block, you’ll get a listing that shows:

- Account
- Budget for that account
- YTD activity
- Commitments
- Available balance

Double-click on any of the accounts to bring up a new screen, Detail Transaction Activity. This screen breaks out all of the budget activities for the selected account for the year to date.
Alternatives to Banner

City College, through the Web4 system and some other systems, has put much of the information that is relevant to department chairs online. You may find these techniques more convenient than using Banner Forms.

How can I get enrollment information?

The Scheduling Office publishes a version of the time schedule that has enrollment information listed. Go to:

http://www.ccsf.edu/Schedule/Enroll

If you are off campus, you will need to enter the following name and password:

Name: intranet
Password: netintra

How can I get a class list?

There are several ways to get a class list:

1. From the Schedule of Classes with enrollment information noted above, you can click on the CRN for the section and get a class list. You will need to enter your Web4 login and PIN number.

2. Log in to Web4, then use Faculty Information to get class lists. Department chairs can also look up class lists by CRN or faculty ID number under the Department Chair menu.

How can I get an instructor’s schedule?

Find the instructor in the time schedule, and then click on their name. You will get a web page that shows the instructor’s current schedule of classes. This information is also available from the online directory.
Advanced Banner

These techniques, while not required for basic Banner department chair use, can make Banner more powerful and flexible for you.

How do I customize the My Banner menu?

There is a folder at the top of the Banner Main Menu called “My Banner”. Use My Banner Maintenance (GUAPMNU) to insert or remove forms from this menu.

How can I print a Banner report on any printer?

In this process, the results of a Banner report are saved in Banner, instead of printing to a Banner printer. You can then view the report in Banner, open it up in a separate Web browser, and print it out.

1. Find the report you would like to print. In this manual, we have talked about two: Class Roster (SFRSLST) and Department WSCH Report (SWRM22)
2. Instead of filling in a Banner printer name in the second block, enter DATABASE
3. Fill in the report parameters as usual in the third block, navigate to the fourth block, and click on Save to run the report. The report will now be executed, and the results saved to the Banner database. For short reports like the ones listed above, the results should be saved fairly instantaneously.
4. Exit back to the main menu, then go to the Saved Output Review form (GJIREVO)
5. In this form, enter the abbreviated name of the report (e.g., SFRSLST) into the Process field, then click on the downward-pointing triangle next to the Number field. You’ll get a listing of files you can view – double-click to open a file. The results of your report will be in a file whose name ends is ‘.lis’. If you have run the report several times, they should be in chronological order. (the actual number of the file was displayed in the status bar after step 3 above).
6. To print out this file on any printer, you will need to open up this file in a separate browser window. You can do this by choosing the File, Save menu option, or by clicking on the Save toolbar button. Note: You may need to disable any pop-up blocking in order for this feature to work.
7. Once you have the results of the report in a separate browser window, you can print it using your browser’s File, Print menu
option. For SWRMC22, you might want to use the File, Page Setup menu option to set output to landscape.

8. Close this newly opened browser window when you’re done.

*Can I save the contents of a report to a file?*

Yes. Use the technique described above, but instead of printing the report, use your web browser’s Save option (under File) to save the results.