

BANNER HELPFUL TIPS & TRICKS

- **Banner** organizes its data into forms. All data is entered, maintained, edited, and queried within forms. Generally each form contains a window or a key Information area in which you must enter your search criteria before the form will populate. Below is a breakdown of the 7-letter form name:
 - **Forms are named by their 7-Letter Form Names:**
 - The 1st letter tells you which module the form is in (e.g. S = Student; F = Finance; etc.).
 - The 2nd letter tells you which sub-module the form is in (e.g. G = General; P = Person; etc.).
 - The 3rd letter tells you which of the 5 major categories the form is divided into.
 - The final 4 letters are abbreviations for Descriptive Form Names (e.g. SPAIDEN = **IDENT**ification).
 - **Forms are divided into 5 major categories:**
 - **A - Application Forms:** used to enter, update, and query information (e.g. SFASLST = Student Roster *Application* Form).
 - **M - Maintenance Forms:** used to establish criteria crucial to processing information entered on application forms, or to look up information already entered in Banner (e.g. FTMCOAS = Chart of Accounts Code *Maintenance* Form).
 - **V - Validation Forms:** used to see values that are defined on maintenance form (e.g. FTVSDAT = System Data *Validation* Form).
 - **Q - Query Forms:** used to look up existing information, often returning to the original form – you cannot access Query forms from the main menu, rather only by linking to one via a Related Form.
 - **I - Inquiry Forms:** similar to a Query form – used to look up existing information, often returning information to the original form. You may, however, access Inquiry forms directly from the main menu (e.g. FGIBDST = Organization Budget Status *Inquiry* Form).
- **Searching** is now easier with Banner ADMIN when finding forms, and wildcard characters are still available for locating users (e.g. % and _).
 - **Using %** in the place of multiple characters: KATH% will locate users starting with “Kath” (e.g. Kathy, Kathie, Kathryn, Katherine, etc.).
 - **Using _** in the place of a single character: _ATHRYN will locate users who are “Cathryn” or “Kathryn”.
 - **Using % and _** in combination with the above: _ATH% will locate users that contain “ath” in their name (e.g. Kathy, Katheryn, Nathan, Nathaniel, etc.).
- **Google Chrome** is the recommended browser for using Banner. Save forms frequently and try to stick one tab at a time while viewing or making edits to a form. Sign out when you are done or planning to step away; Banner will time out after a time of inactivity (30 minutes).
- **Helpful resources** are available on the Banner website using the Help (?) button in the top right of the page. For more resources, check out our Knowledge Base articles at www.liberty.edu/HelpDeskDIY, or head to www.liberty.edu/banner for documentation you may view, print, or download.
- **Technical assistance** is available by calling the IT Helpdesk at (434) 592-7800 or chat with one of our agents at www.liberty.edu/hdChat.