Banner Learning Guide

How to Create a Banner Learning Guide

Last revised: April 7, 2008
This learning guide is based upon Sungard Higher Education Banner documentation. This document is for use at Wichita State University for the purpose of training; the information contained is considered confidential.

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UCATS Banner User Services

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## Session Overview

### Introduction

*How to Create a Banner Learning Guide* introduces the Learning Guide layout and tools to create a learning guide.

### Prerequisites

The following are prerequisites for completing this session:
- Experience using a computer and mouse.
- Experience with Microsoft Windows navigation.

### Expected Outcomes

At the end of this session, you will be able to:
- Use the Banner Learning Guide Template.
- Use FullShot to create screen captures.

## Learning Guide Icons

In the Banner learning guides, icons may be used to highlight important information.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🧷</td>
<td>Indicates an important trap to avoid.</td>
</tr>
<tr>
<td>🔴</td>
<td>Indicates an important warning regarding the form or data entry.</td>
</tr>
<tr>
<td>📞</td>
<td>Indicates a shortcut or tip.</td>
</tr>
<tr>
<td>🎮</td>
<td>Indicates hands-on exercise or activity.</td>
</tr>
</tbody>
</table>

## Training Information

### Training Resources

Banner learning guides (PDF and on-line) and other helpful information are located under *Training Resources* on *myTools*.

### Training Schedule

*Training/Workshop Registration* is located on *myTools*.
- **Register** button – View session description, dates/times and/or register for training.
- **Session** button – View or drop individual registrations.
Help Desk Contact Information

In Self Service, look for this icon to view On-Line Help
(Self Service is accessed through myWSU)

<table>
<thead>
<tr>
<th>Type of Question</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passwords</td>
<td>University Computing Help Desk</td>
</tr>
<tr>
<td>e-mail</td>
<td>Ken Pavlicek</td>
</tr>
<tr>
<td>hardware, software</td>
<td>Jessica Wolf</td>
</tr>
<tr>
<td>Students</td>
<td>Brenda Johnson</td>
</tr>
<tr>
<td>myWSU and Self Service</td>
<td>Marguerite Schmidt</td>
</tr>
</tbody>
</table>

**Faculty and Staff Training & Support**

<table>
<thead>
<tr>
<th>Type</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner myWSU</td>
<td>316-978-5800</td>
</tr>
<tr>
<td>Self Service</td>
<td><a href="mailto:BannerHelp@wichita.edu">BannerHelp@wichita.edu</a></td>
</tr>
<tr>
<td>Reporting Services</td>
<td>Becky North</td>
</tr>
<tr>
<td>Training Registration</td>
<td>Jennifer Snyder</td>
</tr>
<tr>
<td>Training Resources</td>
<td><a href="http://mywsu.wichita.edu">http://mywsu.wichita.edu</a> &gt; myTools &gt; WIN Tools</td>
</tr>
</tbody>
</table>
Banner Learning Guide Overview

Overview

Banner Learning Guides created for Wichita State University are required to use the Banner Template to reflect a consistent look and feel. A secured shared drive will house all Banner Learning Guides in a central location.

Template Definitions

Fields

In a few places in the template, text appears as follows:

"[Chapter Title]"

Any text that is surrounded by "[ ]" indicates that it is a field. A field is an area of text that has a certain formatting and style. To change this text, click inside the brackets and type. The text that replaced the field will have the same formatting and style.

Macros

A macro is a collection of steps that is recorded and saved in Microsoft Word. Instead of repeating these steps, Word remembers what steps were performed and repeats them when the macro is executed.

Seven macros are included in the template. To execute a macro, click the appropriate labeled button on the Learning Guide Toolbar.

Note: Office 2007 users can find the Learning Guide Toolbar under the Add-Ins ribbon option.

Title Page

The title page contains the learning guide title as well as a last revised date. The learning guide title is a field and should be changed as indicated above for each learning guide.

Page two of the title page contains a disclaimer, department name, last revised date, and template version. The department name is also a field and should be changed as indicated above. The template version indicates the version of the Banner Template. This page must be included in all learning guides.

The last revised date does not need to be changed manually. It will update with the current date when saved.

Continued on next page
**Template Definitions**, Continued

**Header**
The header appears at the top inch of each page of the learning guide, starting above Section A. It contains the words Wichita State University.

**Footer**
The footer appears at the bottom inch of each page of the learning guide, except the first page. It contains the learning guide title, last revised (saved) date and the current page number. They are all automatically maintained.

**Table of Contents**
The table of contents states the learning guide title and a list of the sections included in the guide. It is updated by clicking on the **Update TOC** button in the Learning Guide toolbar.

**Section**
Each section may be comprised of one or more of the following components: a header, an information block, an instruction block, and screen shots.

A **section header** is a 1 x 2 table (1 row by 2 columns) located at the top of each section. It indicates the section title and section letter.

An **information block** is a 1 x 2 table that contains information, such as the overview and expected outcomes.

An **instruction block** is similar to an information block in formatting, but provides step by step directions of a process to perform. Instead of having only a 1 x 2 table, this table will have any number of rows and 2 columns.

**Screen shots** are files or pictures that can be included in the learning guide to aid learners with a visual confirmation of the instructions. Banner Learning Guides are developed using FullShot, a screen capture software. Contact Banner User Services to obtain installation instructions. See **Creating Screen Shots with FullShot Learning Guide** for instructions on using FullShot.

**Inserting Screen Shots**
To insert a screen shot, place the cursor where the image will be placed. Select **Insert, Picture, From File**. Navigate to where the picture is located, select it, and then click **Insert**.

See **Creating Screen Shots with FullShot Learning Guide** for instructions on using FullShot.

*Continued on next page*
Template Definitions, Continued

Style Selection
Various areas in the learning guide have different formatting or styles. The Style drop down box is located on the formatting toolbar.

To change the style of text, first select the text. Next, click on the Style drop down arrow and select the appropriate style from the list. The styles used most in this learning guide are Normal, Topic Title, and Unit Line.

Table Editing
Any number of rows may be added in the contacts section. As rows are entered or deleted, Microsoft Word will automatically adjust the table formatting.

To insert a row, place the cursor where the row will be inserted. Select Table, Insert, and select either Rows Above or Rows Below. Rows Above will insert one row above the current position and Rows Below will insert one row below the current position.

To delete a row, place the cursor in the row to be deleted and select Table, Delete, Rows. Multiple rows may similarly be deleted by selecting them first and then using Table, Delete, Rows.

Edit, Undo
Remember: The Edit, Undo command or Undo button is everyone’s best friend. If a mistake is made, just undo it. Some things may take more than one “undo” to reverse an action, such as macros. Keep clicking on the Undo button until the desired look is achieved.
Learning Guide Toolbar

Introduction
The Learning Guide Toolbar contains special commands to aid in learning guide creation. The toolbar contains buttons to update the table of contents, execute macros and insert learning guide icons.

Update Table of Contents (TOC)
The table of contents is automatically formed. It looks for the section headers and topics in the learning guide and places them in the table of contents. To update the table of contents, click this button:

Go to Table of Contents (TOC)
To go to the table of contents from any point in the learning guide document, click this button:

Section Macro
The Section macro is used to insert a new section header and unit line at the top of a page. The section letter is automatically managed. Clicking this button:

will insert this:

"[Chapter Title]"

Topic Macro
The Topic macro is used to select the correct formatting for topic titles. Click the following button:

Continued on next page
Learning Guide Toolbar, Continued

**Topic Continued Macro**

The **Topic Continued** macro is used to continue a topic from a previous page. Use the **Undo** button to undo this macro. Clicking this button:

![Topic Continued](image)

will insert this:

, Continued

**Unit Line Macro**

A **Unit Line** appears before and after each information block and instruction block. Clicking this button:

![Unit Line](image)

will insert this:

![Unit Line](image)

The macros will produce a unit line after each section header, information block and instruction block. If a unit line is accidentally deleted, use this macro to insert a new unit line.

**Block Macro**

The **Block** macro is used to insert a new 1 x 2 table and unit line for an information block. To undo this macro, select the table and unit line and press **[Delete]**. Clicking this button:

![Block](image)

will insert this:

![Block](image)

Continued on next page
Learning Guide Toolbar, Continued

Block Continued Macro

The Block Continued macro is used to indicate that the topic will be continued on the next page and is placed directly below the block. To undo this macro, click the Undo button three times. Clicking this button:

![Block Continued](image)

will insert this:

```
Continued on next page
```

Instructions Macro

The Instructions macro is used to insert a new 2 x 2 table and unit line for an instruction block. To add more lines to this table, go to the last line in the table and press the [Tab] key. The table will automatically number the new row. To undo this macro, select the table and unit line and press [Delete]. Clicking this button:

![Instructions](image)

will insert this:

```
<table>
<thead>
<tr>
<th>![Information]</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
</tbody>
</table>
```

Split Table

Some instruction blocks will not fit on one page and may need to be continued on the following page. The Split Table button allows a table to be split in two. To split a table, place the cursor in the row that will be on the next page and click this button:

![Split Table](image)
Learning Guide Toolbar, Continued

Exercise Icon  The Exercise icon is used to identify a hands-on exercise or learning activity. Use this icon in row 1, column 1 of any instruction block. Clicking this button:

![Exercise Icon]

will insert this:

![Exercise Icon]

Warning Icon  The Warning icon is used to indicate an important warning. This icon may be used in information or instruction blocks. Clicking this button:

![Warning Icon]

will insert this:

![Warning Icon]

Tip Icon  The Tip icon is used to indicate a shortcut or tip. This icon may be used in information or instruction blocks. Clicking this button:

![Tip Icon]

will insert this:

![Tip Icon]

Trap Icon  The Trap icon is used to indicate an important trap to avoid. This icon may be used in information or instruction blocks. Clicking this button:

![Trap Icon]

will insert this:

![Trap Icon]
## WIN Training Network Drive

<table>
<thead>
<tr>
<th>Network Drive</th>
<th>A network drive is disk space in the network.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Drive</td>
<td>A hard drive is the disk drive that resides in a computer (laptop or desktop) and is usually the C:\ drive.</td>
</tr>
<tr>
<td>WIN Training Drive</td>
<td>Banner Learning Guides will be saved on the <strong>WIN Training</strong> drive. Each computer must be mapped to this drive to access it. Names must be submitted to Becky or Jennifer for permissions to this network drive.</td>
</tr>
</tbody>
</table>

### Why Use a Network Drive?

The WIN Training drive is backed up every night. If your hard drive is not backed up daily, you run the risk of losing your data. By placing the learning guides on the WIN Training Drive, your data is protected.

It also provides a central location for posting learning guides to the web. If someone in another department needs to look at your learning guides, they can simply look on the WIN Training Drive. This saves time spent looking for the most current copy and saves space in email inboxes.
File Folder Hierarchy

Overview
All Banner Learning Guides will be saved on the WIN Training Drive. For today’s lab, the learning guide will be saved on the floppy drive. Before creating any documents or capturing pictures, a proper file hierarchy must be established.

Department Folder(s)
Learning Guide (Folder for each learning guide)
- Learning guide document (Word document)
- Screen Shots (Folder for screen shots)
  - Section Letter (Folder for screen shots)
    - Annotate (Folder for annotations)
      - 1 screen shot (.FSD file)
      - 2 screen shot (.FSD file)
    - 1 screen shot (.BMP file)
    - 2 screen shot (.BMP file)
  - Section Letter (Folder for screen shots)
    - 1 screen shot (.BMP file)
    - 2 screen shot (.BMP file)

Example:

```
SPAIDEN
  General Person Screen Shots
    Section C
    Section D
      Annotate
        3 spaiden.fsd
        1 current id tab.bmp
        2 goamtch.bmp
        3 spaiden.bmp
        4 name.bmp
        5 autohint.bmp
    Section E
    Section F
    Section G
    Section H
    Section I
    Section J
    Section K
```
Create a Learning Guide

Overview
This section shows step by step instructions of how to create a short learning guide. By following the steps, a sample learning guide will be produced to show users how to enter a new person record in Banner.

Exercise: Macro Security Setup

If the macros (icons on the Learning Guide toolbar) do not work on your computer, you may need to adjust the Macro Security. This exercise also needs to be completed in your office, for each computer that you will be using to create learning guides.

1. Open Microsoft Word.
2. Open the file Banner Template.doc. The following toolbar will appear under the Ribbon.

   ![Security Warning][1]

   Click Options.

3. Select the Enable the content radio button and click OK.

   ![Security Alert - Macro][2]
Exercise: Saving the Learning Guide

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Open the file <strong>Banner Template.doc</strong>.</td>
</tr>
<tr>
<td>2</td>
<td>Select <strong>File, Save As</strong> and navigate to the <strong>My Documents</strong> folder.</td>
</tr>
<tr>
<td>3</td>
<td>In the file name box, enter <strong>General Person Identification</strong> and click <strong>Save</strong>.</td>
</tr>
</tbody>
</table>

Exercise: Title Page

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Change the learning guide title.</td>
</tr>
<tr>
<td>1</td>
<td>Click the “<strong>[LG Title]</strong>” on the first page.</td>
</tr>
</tbody>
</table>
| 2 | Enter **General Person Identification**.  

*Do not press [Enter]. If it was pressed, press the [Backspace] key to delete the added line.* |
| 3 | Scroll down to page 2. |

Exercise: Confidential Business Information

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Change the department information.</td>
</tr>
<tr>
<td>1</td>
<td>Click the &quot;<strong>[Department Name]</strong>&quot; on the second page.</td>
</tr>
</tbody>
</table>
| 2 | Enter your department information.  

*Do not press [Enter]. If it was pressed, select **EDIT, UNDO**.* |
| 3 | Scroll down to page 4. |
# Exercise: Session Overview

<table>
<thead>
<tr>
<th></th>
<th>Establish Section A.</th>
</tr>
</thead>
</table>
| 1 | To the right of the **Introduction** enter:  
   Banner Navigation and General Person (SPAIDEN) introduces the navigation techniques required to use the general person form SPAIDEN. |
| 2 | To the right of the **Expected Outcomes**, after “participants will” enter:  
   be able to navigate and create a Banner general person record. |
| 3 | Scroll down to page 5. |
Exercise: Section C

<table>
<thead>
<tr>
<th></th>
<th>Establish section C.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click on the words &quot;[Chapter Title]&quot; and enter: Establishing a Person Record</td>
</tr>
<tr>
<td>2</td>
<td>In the column next to <strong>Overview</strong>, enter: <em>Following an extensive search to ensure duplicate records will not be entered into the database, a new record may be created.</em></td>
</tr>
<tr>
<td>3</td>
<td>Click on &quot;[Topic Title]&quot; and enter: General Person Identification (SPAIDEN)</td>
</tr>
<tr>
<td>4</td>
<td>In the block following the topic title, enter the following in the first column: General Person Identification Overview</td>
</tr>
<tr>
<td>5</td>
<td>[Tab] over to the next column and enter: General Person Identification Form [SPAIDEN] is used to capture biographic and demographic information for all persons associated with Wichita State University. Persons may belong to any or all of the Banner applications. All persons are first entered into the database using this form. The information maintained in this form is specific to the person and is not related to the person’s involvement at the university.</td>
</tr>
</tbody>
</table>

---

Establishing a Person Record

<table>
<thead>
<tr>
<th>Section</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overview</strong></td>
<td><em>Following an extensive search to ensure duplicate records will not be entered into the database, a new record may be created.</em></td>
</tr>
</tbody>
</table>

General Person Identification (SPAIDEN)

| General Person Identification Overview | General Person Identification Form [SPAIDEN] is used to capture biographic and demographic information for all persons associated with Wichita State University. Persons may belong to any or all of the Banner applications. All persons are first entered into the database using this form. The information maintained in this form is specific to the person and is not related to the person’s involvement at the university. |

---

Continued on next page
### Exercise: Section C, Continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>To add more information, a new block must be inserted. Click the Show/Hide button to view non-printing characters. Position the cursor two rows under the block and line (where the circle is located). One line is located directly below the unit line. Due to the formatting, you will not see the entire paragraph marker to indicate a line is present.</td>
</tr>
<tr>
<td>7</td>
<td>Click the <strong>Block</strong> button to insert a new block.</td>
</tr>
<tr>
<td>8</td>
<td>Click the <strong>Show/Hide</strong> button to turn off non-printing characters.</td>
</tr>
<tr>
<td>9</td>
<td>In the new block, enter in column 1: Menu Path</td>
</tr>
<tr>
<td>10</td>
<td>Enter the following in column 2: SCT Banner, Student, General Person, <em>General Person Identification [SPAIDEN]</em></td>
</tr>
</tbody>
</table>
Exercise: Inserting Instructions

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Go to the bottom of the document using the hot key [CTRL] + [End]. Place the cursor two rows below the block. Click the <strong>Topic</strong> button to insert a new topic. Enter: Creating a New Person Record Press the [Enter] key twice. A line will appear under the topic.</td>
</tr>
</tbody>
</table>

2 | Click the **Instructions** button to insert a new instruction block. |

### General Person Identification (SPAIDEN)

**General Person Identification Overview**

General Person Identification Form [SPAIDEN] is used to capture biographic and demographic information for all persons associated with Wichita State University. Persons may belong to any or all of the Banner applications. All persons are first entered into the database using this form. The information maintained in this form is specific to the person and is not related to the person's involvement at the university.

**Menu Path**

SCT Banner, Student, General Person, **General Person Identification [SPAIDEN]**

### Creating a New Person Record

The next steps will tell you to go to a certain row and column. **Note that the row number is not indicated by the number in the left column.**

3 | In row 1, column 2 click on the word “[Information]” and enter: Process to create a new person record. |

4 | Press the [Tab] key twice to go to row 2, column 2. Enter: Activate the Banner general person form SPAIDEN. |

5 | Press the [Tab] key twice to go to row 3, column 2. A new row is created and the numbering automatically continues. Enter: Click the **Generate ID:** icon. |
### Exercise: Inserting Instructions, Continued

<table>
<thead>
<tr>
<th>Row</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Press the [Tab] key twice to go to row 4, column 2. Enter: The word <strong>GENERATED</strong> will appear in the <strong>ID:</strong> box.</td>
</tr>
</tbody>
</table>
| 7   | Press the [Tab] key twice to go to row 5, column 2. Enter: **Next Block** or click inside the **ID:** box under the Current Identification tab. The word **GENERATED** will appear in the **ID:** box.  
This would be a good place to later add a screen shot. To allow equal spacing before and after the picture, press the [Enter] key three times. |
| 8   | Press the [Tab] key twice to go to row 6, column 2. *Because the previous row started with bold formatted words, the table continues the formatting.* Click the **Bold** button on the toolbar to turn off bold formatting. Enter: 
   - Enter your name into the **Last Name:** and **First Name:** boxes using mixed case. 
   - The **SOAIDEN** name search query can be activated by clicking on the drop down arrow to the right of last and first name boxes. |
| 9   | Press the [Tab] key twice to go to row 7, column 2. Enter: **Save** the record. |
| 10  | Press the [Tab] key twice to go to row 8, column 2. Click the **Bold** button on the toolbar to turn off bold formatting. Enter: 
   - A unique Banner ID number is automatically generated and displayed in the two **ID:** boxes. |
| 11  | Press the [Tab] key twice to go to row 9, column 2. Enter: 
   - When a record is created, the system will update the following information in the **ID and Name Source** block: Original Creation block and Last Updated section. 
   - While entering the following information, the information block will run onto the next page. |
| 12  | Press the [Tab] key twice to go to row 10, column 2. Enter: 
   - The **Auto Hint and Status Bar** located at the bottom of the form indicates if the record was saved or if errors occurred that prevented record saving. |
Exercise: Inserting Icons – Part 1

<table>
<thead>
<tr>
<th></th>
<th>Insert Tip icon in the instructions.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the Show/Hide button to view non-printing characters.</td>
</tr>
<tr>
<td>2</td>
<td>Scroll up to row 6, column 1 (step 5) under Creating a New Person Record.</td>
</tr>
<tr>
<td>3</td>
<td>Click next to the number 5.</td>
</tr>
<tr>
<td>4</td>
<td>Press the [Space Bar] and then press the [Enter] key.</td>
</tr>
<tr>
<td>5</td>
<td>Press the [Backspace] key twice to remove the extra number that was inserted.</td>
</tr>
<tr>
<td>6</td>
<td>Press the [Enter] key twice and then click the Tip button to insert the tip icon.</td>
</tr>
<tr>
<td>7</td>
<td>Click the Center Alignment button to center the icon in the column.</td>
</tr>
<tr>
<td>8</td>
<td>Click the Show/Hide button to turn off non-printing characters.</td>
</tr>
</tbody>
</table>
## Exercise: Inserting a Screen Shot

<table>
<thead>
<tr>
<th>Step</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Scroll up to step 4. Place the cursor on the second to the last line in the row.</td>
</tr>
<tr>
<td>2</td>
<td>Select <strong>Insert, Picture, From File</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>In the <strong>Look In</strong> box, select the following: 3 ½ Floppy (A:) drive, General Person Identification folder, Section C folder.</td>
</tr>
<tr>
<td>4</td>
<td>Select the screen shot named <strong>1 spaiden</strong> and click <strong>Insert</strong>.</td>
</tr>
</tbody>
</table>
# Exercise: Inserting Icons – Part 2

<table>
<thead>
<tr>
<th></th>
<th>Insert an <strong>Exercise</strong> icon in the instructions.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Scroll up to the top of the instruction block.</td>
</tr>
<tr>
<td>2</td>
<td>Place the cursor in row 1, column 1.</td>
</tr>
<tr>
<td>3</td>
<td>Click the <strong>Exercise</strong> button to insert the exercise icon.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Creating a New Person Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Activate the Banner general person form <strong>SPAIDEN</strong>.</td>
</tr>
<tr>
<td>2</td>
<td>Click on the <strong>Generate ID</strong> icon.</td>
</tr>
</tbody>
</table>

|   | Go to the bottom of the document by using the hot key **[CTRL] + [End]**. |

---
## Exercise: Splitting a Table

<table>
<thead>
<tr>
<th>Step</th>
<th>Instructions</th>
</tr>
</thead>
</table>
| 1    | Place the cursor in row 6 (step 5). Click the **Split Table** button.  
|      | ![Split Table](image)  
|      | This will insert a blank line between step 4 and step 5 and place step 5 at the top of page 7.  
| 2    | Click the **Block Continued** button to insert a unit line and the words *Continued on next page*.  
|      | ![Block Continued](image)  
| 3    | Press **[CTRL] + [Enter]** to force a page break.  
| 4    | At the top of page 7, click the **Topic** button. Enter: Creating a New Person Record  
| 5    | Click the **Topic Continued** button.  
|      | ![Topic Continued](image)  
| 6    | Press the **[Delete]** key to delete the extra line between the unit line and the instruction block.  

---

*Creating a New Person Record, Continued*

5. Enter your name into the **Last Name:** and **First Name:** boxes using mixed case.  
   The **SOAIDEN** name search query can be activated by clicking on the drop down arrow to the right of last and first name boxes.
## Exercise: Section D

<table>
<thead>
<tr>
<th></th>
<th>Establish Section D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Press [CTRL] + [Enter] to force a page break.</td>
</tr>
<tr>
<td>2</td>
<td>Click the <strong>Section</strong> button.</td>
</tr>
<tr>
<td>3</td>
<td>Click the words &quot;[Chapter Title]&quot; and enter: <strong>SPAIDEN Address Tab</strong>.</td>
</tr>
<tr>
<td>4</td>
<td>Go to the bottom of the document by using the hot key [CTRL] + [End].</td>
</tr>
<tr>
<td>5</td>
<td>Click the <strong>Block</strong> button to insert a new block. In the first column, enter: <strong>Overview</strong></td>
</tr>
</tbody>
</table>
| 6 | **[Tab]** over to the next column and enter:  
*Click on the **Address** tab on **SPAIDEN** to enter an address for the record previously created.* |

---

<table>
<thead>
<tr>
<th><strong>SPAIDEN Address Tab</strong></th>
<th><strong>Section D</strong></th>
</tr>
</thead>
</table>

---

*Click on the Address tab on SPAIDEN to enter an address for the record previously created.*
### Exercise: Table of Contents

<table>
<thead>
<tr>
<th>1</th>
<th>Click the <strong>Go to TOC</strong> button on the Learning Guide toolbar.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Scroll up or down accordingly to view the entire table of contents.</td>
</tr>
<tr>
<td>2</td>
<td>To update the table of contents, click the <strong>Update TOC</strong> button on the Learning Guide toolbar.</td>
</tr>
<tr>
<td></td>
<td>The table should now look like this:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>General Person Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Table of Contents</strong></td>
</tr>
<tr>
<td>A. Overview .......................................................... 4</td>
</tr>
<tr>
<td>Session Overview ................................................ 4</td>
</tr>
<tr>
<td>Learning Guide Icons ........................................... 4</td>
</tr>
<tr>
<td>B. Contact information ............................................... 5</td>
</tr>
<tr>
<td>C. Establishing a Person Record ..................................... 6</td>
</tr>
<tr>
<td>General Person Identification (SPAIDEN) .......................... 6</td>
</tr>
<tr>
<td>Creating a New Person Record ................................. 6</td>
</tr>
<tr>
<td>D. SPAIDEN Address Tab ........................................... 8</td>
</tr>
</tbody>
</table>
Homework

When you return to the office, you will need to do the following:

1. Map the WIN Training Drive to your computer.  
   *Refer to handout for instructions.*

2. Access the training drive and verify that the correct folder hierarchy exists for your department. If the folder does not exist, create a folder for your department or module.

   *Create a separate folder for each learning guide under your department or module folder.*

3. Install FullShot on your computer.