

# **Banner 9 Training**

## **Navigation Overview and Reference**

Version 2.0

**Talent Development**

Human Resources  
Pace University  
2020

## General Navigation Updates - Ellucian Rationale for upgrade from Banner 8:

According to Ellucian, "The Banner 9 Administrative Applications provide a modernized user interface, improved navigation and accessibility with cloud-ready solution architecture." The key functionality and features include navigational improvements such as filtering vs. querying, lookup and search improvements, multiple record views, recently viewed pages icon, all within a more modern and intuitive interface. Banner 9 also has an improved extensibility framework to eliminate the need for customizations and decrease the time to implement upgrades.

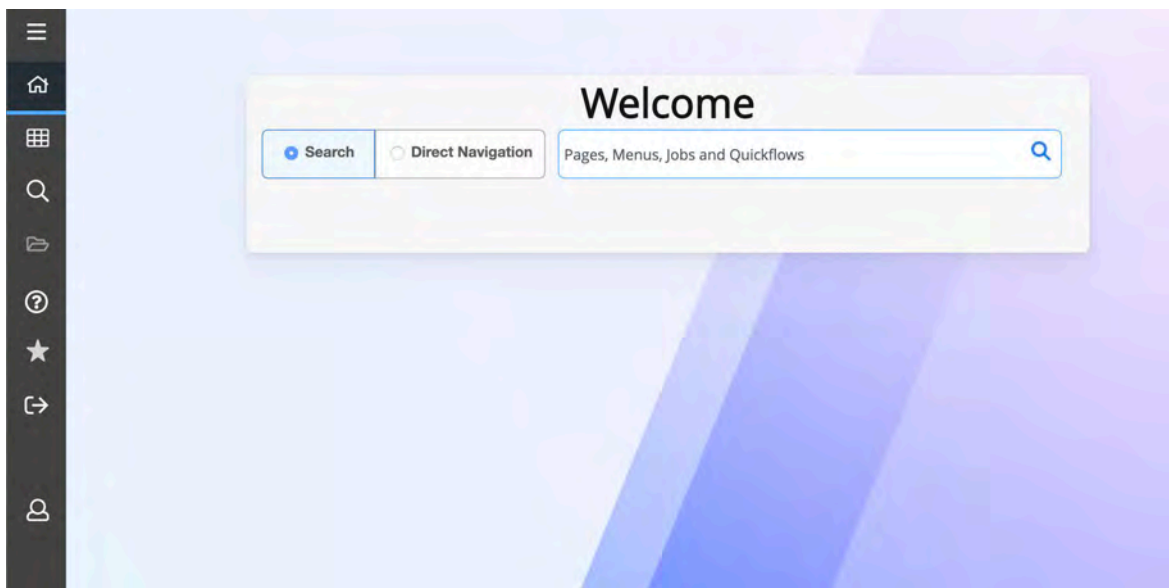
## Key Terminology Changes:

If you need a reference with the relationship between Banner 8 and Banner 9 key terms when using Banner 9, perhaps you have an old role-specific job aid with only Banner 8 navigation terms, the below table can be used. E.g. "Forms" in Banner 8 are "Pages" in Banner 9:

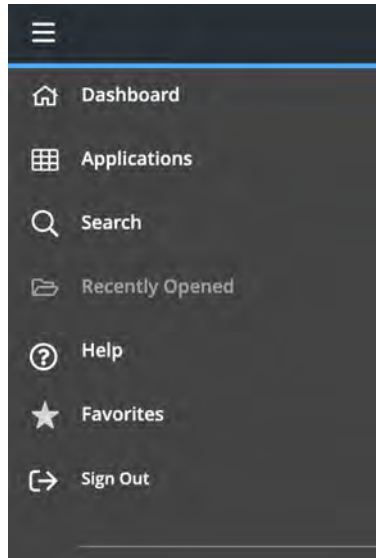
Banner 8	Banner 9
Forms	Pages
Blocks	Sections
Next Block	Go Button
Rollback	Start Over
Query	Filter
Options	Tools

## Using Landing Page Features:

When logging into Banner 9, the landing page or welcome screen will appear.



The landing page components on the main menu panel include:



### Menu Icon

- Looks like a group of three horizontal lines also known as the “hamburger”
- Clicking on the menu icon displays the names of all the icons in the main menu panel
- The menu icon acts like a toggle switch, so to close the menu, click the icon again



### Dashboard Icon

- Click on this to return to the landing page from anywhere in the system
- This looks like a house, or home button



### Applications Icon

- This icon looks like a group of nine small boxes arranged in a grid
- Banner, My Banner and My Links display



### Search Icon

- Search to find pages (much the same as the search on the homepage)



### Recently Opened Icon

- Displays the recently opened pages for a particular Banner session
- If the icon is grayed out, it is because no recently opened pages exist for your session



### Online Help Icon

- A Page **must be open** for Help to contextually search and return results



### Favorites Icon

- Click to see any Pages you have added to your Favorites



### Sign Out Icon

- Indicated by a exit icon
- Used to log out of the system

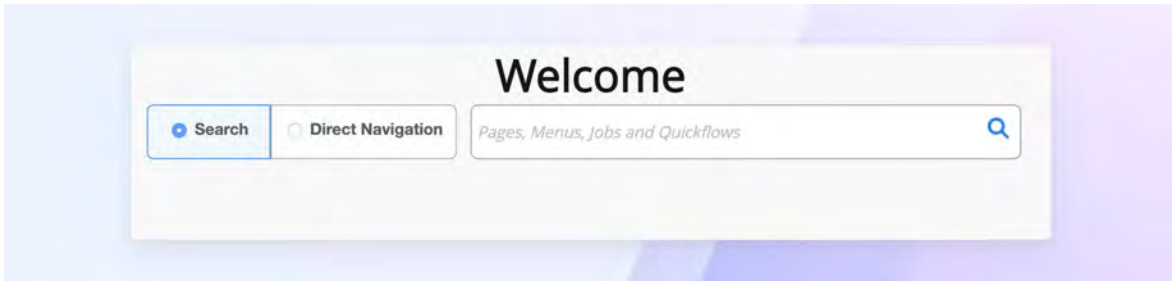


### Profile Icon

- Displays the name of the user logged into the system

### Center Search Box

- Search using either the acronym for the page (SPAIDEN, for example) or the desired, descriptive name.



### Keyboard shortcuts (See Appendix B) *Some differences between Windows & Mac*

- You can review the basic shortcuts by clicking on Help, then "Application Navigator Keyboard Shortcuts". Much more are listed in Appendix B.

## **Basic Navigation to access a Page / Form:**

In Banner 9 you have four basic options to navigate to a Page from the landing page.

### Applications Icon

Click on the icon to view the Banner, My Banner and Banner Self-Service menus. Use the scroll bar as needed to view all of the menus. Continue using the right arrow to expand the menu tree and reach the submodule and page levels. At any time you can click the left arrow to go back to the previous screen, or you can click the Back to Applications link to go back to view all the Banner, My Banner and Banner Self-Service menus. To open the page, click on the page name.

### Search Icon

Click on the icon to view the search function. This will search based on the current Page / Form selected. **If no page is open/selected, it will not return any results**

### Search Box

Click on the box in the middle of the welcome screen or landing page to search for the distinct page name.

### Recently Opened Icon

To view the pages recently accessed, click the Recently Opened Icon. If this is grayed out (inactive) then nothing has been recently accessed for your current session.

## Banner 9 includes the same basic navigation on each page:

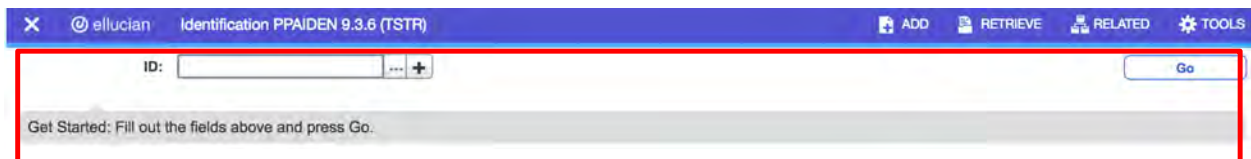
### Page Header



The page header is part of the basic navigation and contains the following items, left to right:

- **Page close icon “X”** – Always use this icon to close your page.
- **Page title** – Includes description, acronym, version, and database.
- **Add and Retrieve** – Banner document management if you have access – this is how you can add and retrieve documents from *Extender* content – please work with your department’s *Extender* representative.
- **Related** button – Displays a list of related pages that can be accessed from the current page.
- **Tools** Menu – Will include refresh, export, print, clear record, clear data, item properties, display ID image, and other options available to the page content.
- **Notification Center** – Will be located to the right of the Tools Menu and will display the following information as needed: successful save of data, warning messages, error messages, informational messages, number of messages to be corrected to continue in the page. You can click in the box with the number in the page header to open or close the Notification Center.

### Key Block (outlined in red)



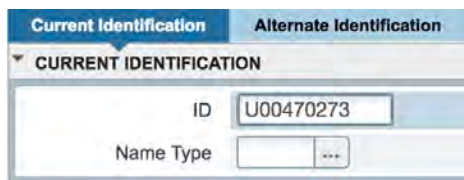
The first block on most pages contains key information. The key block determines what data is entered or displayed on the rest of the page. All the information on the page is related to the key block. The key block stays on the page as subsequent sections are displayed.

When the cursor is in the key block, the fields that can be entered in the key block are enabled. When you leave the key block, the fields in the key block are disabled.

When the cursor is in the key block, the information is displayed in a column format. When you leave the key block by clicking the Go button, the data is rearranged into a linear format and not enterable.

To access the body of the page, populate the key block data and then click Go. You can return to the key block if you are in the body of a page by clicking Start Over.

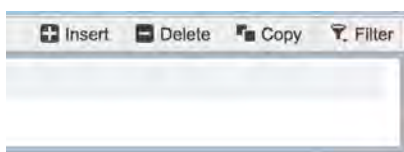
## Sections



The screenshot shows a software interface with two tabs: 'Current Identification' and 'Alternate Identification'. The 'Current Identification' tab is active and expanded, showing a section header 'CURRENT IDENTIFICATION' with a downward arrow. Below the header, there are two input fields: 'ID' containing the value 'U00470273' and 'Name Type' which is empty. To the right of the 'Name Type' field is a small button with three dots.

**Pages** are divided by gray borders into **sections**, for example, Current Identification (above) contain additional details for the key information. A section can represent one record or multiple records depending on the type of information that you are working on. Each section contains related information. Sections of data are accessed by scrolling up and down the page. They can be opened or collapsed by clicking on the arrow on the far-left side of the section header. Some sections are accessed by using tab headings that group information in a meaningful way.

If available, sections can have a header on the right that includes icons for the following actions:



- **Insert** – Use this to insert records in the section.
- **Delete** – Use this to delete records in the section.
- **Copy** – Use this to copy records in the section.
- **More Information (not shown above)** – This icon will only appear if supplemental data can be entered for the record. The icon is displayed with a check mark if supplemental data already exists for the record.
- **Filter** – Use this to filter records in the section.

## Notification Center



You may see four message notification component types when working in Banner 9. Click on the notification message to close it.

**Info Notification** – Will display a blue “i” in a circle when message is displayed. May display an OK button that you must select to continue.

**Success Notification** – Will display a green check mark in a circle when message is displayed.

**Warning Notification** – Will display a “!” in a yield sign when message is displayed. Will also display two buttons, Yes/No, that must be selected to continue.

**Error Notification** – Will display a red “!” in a circle when message is displayed

## Bottom Navigation



The bottom of the section of the page will contain icons to be used for navigation, perform functions, and display additional information.

- Previous Section button – Will take you back in the sections (Alt+ Page Up).
- Next Section button – Will take you to the next section of the page (Alt+ Page Down). **By incorrectly using the Banner 8 (Ctrl + Page + Down), you may be taken directly to the Banner 9 login page.**
- Activity Date – Current system time. This would be the time stamped for the record if created or modified.
- Activity User – Name of account user creating or modifying the record.
- Save button – This the button you will use to save your data

## Data Display Options

### Required Fields

- An asterisk (\*) displayed next to a field name indicates that the field requires a value before you continue on the page.
- The system uses the definition of the field as it is used in the application to determine if it is required.
- For fields that have conditional logic that determines whether they are required, the asterisk (\*) is not displayed.
- If you leave a section or a page without entering information in a required field, the page notifies the individual in the Notification Center, requiring the user to perform some additional action.

### Sort Order

- In a grid layout, values for a field can be sorted and, if you have chosen to sort the data, an up or down arrow next to the field name indicates the current sort order for the field.
- You can click the field label to reverse the sort order.

### Dates

- You can either enter the date directly or use the calendar icon for date selection.
- The date format is mmddyyyy. To enter the current date, type any letter and Tab on your keyboard.

## Lookup

- The Lookup feature allows you to quickly find a value for a field.
- The Lookup button next to a field indicates that the field has the Lookup feature.
- Click the Lookup button (...), enter a filter value, and press Enter to display results that match the filter criteria. You can search, much like a reporting system, or type last name, first name or SSN.
- Select a value and click OK, or double-click a value to return the value to the calling page.
- In addition, when you are in the key block and all you see is the id field, you can press the tab key and this will allow you to enter a name search.

## Filtering Data

You can filter data in a section if there is an active Filter icon in the section header. Use the following steps to filter data in a section.

1. Click the **active Filter (F7)** icon for the section.
2. Choose the field you want to filter from the Add Another Field drop down list.
3. Choose an operator from the Contains drop down list. The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other).

*The Contains operator is available for alphanumeric and other fields only.*

*The Between operator includes the values entered. For example, for codes "between" 1 and 5, the values 1, 2, 3, 4, and 5 are considered. Required fields do not use the Is Null and Is Not Null operators.*

4. Enter a value for the field you selected.
5. Optional: If you want to add another field to the filter criteria, choose a field from the Add Another Field dropdown, select an operator, and enter a value for the field that you selected. Repeat this step until all filter criteria are entered.
6. When all filter criteria are entered, click Go (F8) to display the filter results. The number of records retrieved is displayed at the bottom of the section.

The results for a field can be sorted in ascending or descending order by clicking on the field label in the column header.

You can reverse the sort order by clicking the field label.

7. Optional: If you want to perform another filter, click Filter Again.
8. Optional: If you want to close the filter and display all unfiltered records, click the lowercase x in the upper corner of the filter window to close the filter.



## Wild Card Lookup

When utilizing the Lookup option you may perform either exact match lookups or partial match lookups when some of the information is unknown. To perform a partial match lookup, you will use a "%" to replace the unknown information. For example, when searching for a student with an incomplete UID number you may enter the known information as U0055%47%. In this instance, Banner will search for all U numbers where those two "%" will be substituted with all 10 digits (0,1,2,3,4,5,6,7,8,9) in a looping search.

Hypothetically, if a U number at Pace existed for all the substituted cases in the above example, then 100 U number records would be returned from this wild card lookup. One or more "%" can be inserted into the search value anywhere, including the start and end of the search field value. It can be used both in numerical and alphabetical search field values.

1. Select the lookup icon (...).
2. Choose the type of search to be completed from the option list.
3. Begin the filter process by selecting the appropriate filter. (i.e. ID, Last Name, etc.)
4. Choose the appropriate operator for the list.
5. Add any additional filters if any additional information is known.
6. Select Go button.
7. You will be provide a list of compatible information and may either highlight the information and use the Select button from the lower right of the form or select Cancel.
8. The selected information will be returned to the calling page.

## Multiple Records

Data can exist in multiple records of the same type in the database, for example addresses, and are displayed in multiple ways. Records can be viewed one record at a time or in a grid.

**One record at a time.** In this instance, the details of the data are not displayed in a table grid, but rather in a more easily readable manner. You can move from record to record using pagination controls (the arrows located in the bottom left hand corner)







**In a grid.** In this instance, the data is presented in column and row format. You may need to scroll to view all the data. You can page through the records using the pagination controls, decide how many records you want to review in the grid, and sort the data in ascending or descending order by clicking on the arrows next to the column heading.

## Buttons

Banner admin pages include several buttons.

Button	Description
Add and Retrieve	Use the Add and Retrieve buttons to interact with Banner Document Management to properly store and review documents.
Go	Use the Go button to advance to the body of the page after populating the key block.
Save	Use the Save button to save changes on the page. The Save button is located on the bottom right side of the page.
Section Navigation	Use the Next Section button to navigate to the next section of data. Use the Previous Section button to navigate to the previous section of data. The Next Section and Previous Section buttons are located at the bottom left of each page.
Select and Cancel	Use the Select button to select and retrieve data from a called page to the current page. Use the Cancel button to return to the called page without retrieving any data. When you need to go to a secondary or called page to retrieve data, the Select and Cancel are presented at the bottom of the page.
Start Over	Use the Start Over button to return to the key block of the page.

## Appendix A: Overview of Additional Ellucian Documentation Available

Document	Audience	Comments
 <p>4-Banner 9 FAQ for Finance Office.pdf</p>	Finance Roles	Answers to the most commonly asked questions about Banner
 <p>3-Banner 9 FAQ for Human Resources.pdf</p>	Human Resources Roles	Answers to the most commonly asked questions about Banner 9
 <p>5-Banner 9 FAQ for Student and Financial</p>	Student Affairs, Registrars, Financial Aid and Student Aid Roles	Answers to the most commonly asked questions about Banner 9
 <p>7-Finance Focus-What's New in I</p>	Finance Roles	Improvements to Finance Forms and Self-Service in Finance, and General Updates
 <p>6-Human Resources Focus-What's New in I</p>	Human Resources Roles	Improvements to Employee Forms and Self-Service in Human Resources, and General Updates
 <p>8-Student Financial Aid Focus-What's New</p>	Student Affairs, Registrars, Financial Aid and Student Aid Roles	Improvements to Student & Financial Aid Forms and Self-Service, and General Updates

## Appendix B: Banner Keyboard Shortcuts (from official Ellucian documentation)

Action	Banner 9 Keystroke	Banner 8 Keystroke
Cancel Page, Close Current Page, or Cancel Search/Query	Ctrl + Q	Ctrl + Q
Change MEP Context	Alt + Shift + C	
Choose/Submit	Enter	Enter
Clear All in Section	Shift + F5	Shift +F5
Clear One Record	Shift + F4	Shift +F4
Clear Page or Start Over	F5	Shift +F7
Count Query	Shift + F2	Shift + F2
Delete Record	Shift + F6	Shift +F6
Down / Next Record	Down Arrow	Down Arrow
Duplicate Item	F3	F3
Duplicate Selected Record	F4	F4
Edit	Ctrl + E	Ctrl + E
Execute Filter Query	F8	F8
Exit	Ctrl + Q	Ctrl + Q
Expand / Collapse Drop Down Field	Alt + Down Arrow	Click Field
Export	Shift + F1	Extract Data with Key or Extract Data no Key
First Page	Ctrl + Home	
Insert / Create Record	F6	F6
Action	Banner 9	Banner 8 Keystroke

	<b>Keystroke</b>	
Last Page	Ctrl + End	
List of Values	F9	F9
More Information	Ctrl + Shift + U	Alt + H
Next Field or Item	Tab	Tab
Next Page Down	Page Down	Page Down
Next Section	Alt + Page Down	Ctrl + Page Down
Open Menu Directly	Ctrl + M	F5
Open Related Menu	Alt + Shift + R	
Open Tools Menu	Alt + Shift + T	
Page Tab 1 Page Tab 2, etc.	Ctrl + Shift + 1 Ctrl + Shift + 2	
Previous Field or Item	Shift + Tab	Shift + Tab
Previous Page Up	Page Up	Page Up
Previous Section	Alt + Page Up	Ctrl + Page Up
Print	Ctrl + P	Shift + F8
Refresh or Rollback	F5	Shift + F7
Save	F10	F10
Search or Open Filter Query	F7	F7
Select on a Called Page	Alt + S	Shift + F3
<b>Action</b>	<b>Banner 9 Keystroke</b>	<b>Banner 8 Keystroke</b>
Toggle Multi / Single Records View	Ctrl + G	

Up / Previous Record	Up Arrow	Up Arrow
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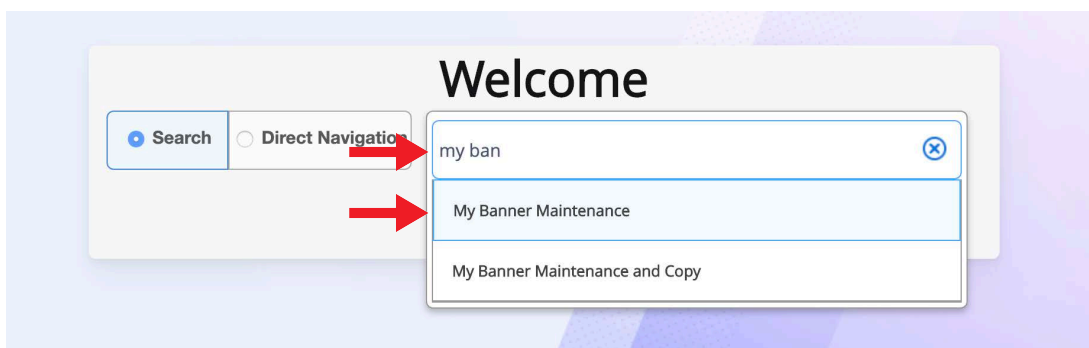
Application Navigator	Banner 9 Keystroke	Banner 8 Keystroke
App Nav - Access Help	Ctrl + M	Banner 9 keyboard shortcuts will work in Banner 8 if you are running Banner 8 with Application Navigator and have applied the keyboard shortcut configuration settings.
App Nav - Access Menu	Ctrl + Y	
App Nav - Display Recently Opened Items	Ctrl + Shift + L	
App Nav - Search	Ctrl + Shift + Y	
App Nav - Sign Out	Ctrl + Shift + F	

**My Banner - personal menu (saves commonly visited pages that you select).**

**Note: This is the Ellucian method. For a shortcut, skip this and try the method on Page 16 (last page)!**

You may create a personal menu tied to your Banner user ID. Your personal menu will contain the pages, jobs, menus, and Quickflows that are most important in your daily work. Once the personal menu is created, you may access it from the main menu on the left under Applications > My Banner

1. From the Application Navigator page, use either the search box in the middle of the screen or the search icon to enter either "My Banner" or "GUAPMNU".

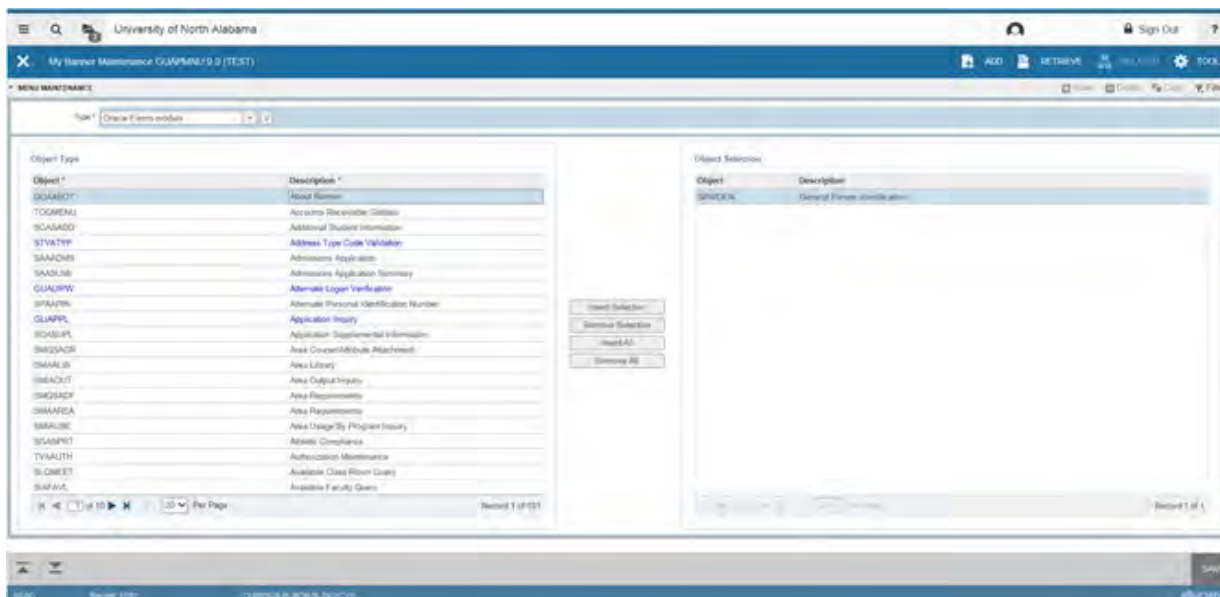


2. **The My Banner maintenance page contains:**

- **Type:** A drop down menu located the top of the screen to allow you to choose from Oracle Forms, Job Submissions, Menus, Menu Messages, and Workflows to access all forms needed to customize your My Banner.
- **Object Type:** All available pages, jobs, menus, or quickflows associated with the chosen type selected from the drop down menu.
- **Buttons:** Buttons are used to insert or remove selections from the available list to your My Banner list.
- **Object Selection:** Will display the contents of your personal menu.

3. **To add objects to your personal menu,** select the name from the **left** pane by double clicking it and then use the Insert buttons in the middle of screen to add to the **right** pane.

**NOTE: In my experience, I've found this counterintuitive and inconsistent in operation. Ensure when selecting the name by double clicking it in the left panel that it turns a royal blue color, like a web link (without the underline) before trying to use the Insert Selection button in the center.**

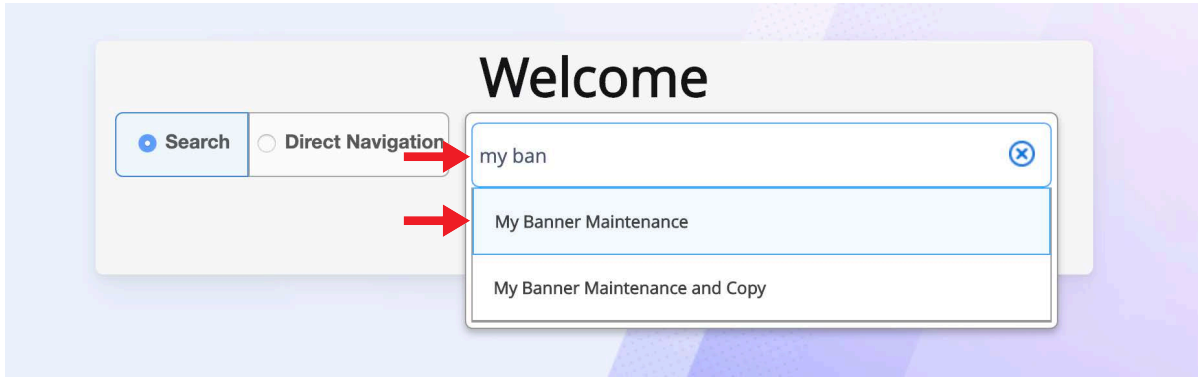


4. After each page selection to the right pane, select **Save** in the bottom right hand corner to retain selections.

5. You will have to **sign out and sign back in** to see changes on your My Banner.

## Shortcut to creating your *My Banner* personal menu

- 1 In the search box, type "my ban" and a list will appear. Select "My Banner Maintenance".



- 2 Beginning with the Object Selection panel (the right panel), select the first open record (as shown in the below detailed image). This is displayed as a box with a cursor available. Enter the page code and **arrow down** on the keypad (typically next to the number pad) to create the next record. It is handy to have a predefined list of the pages' codes prior to entering them here, as Banner will not search within this field.
- 3 You may enter as many pages as you wish. Remember to select **Save** before exiting the page.
- 4 You will have to sign out and sign back in to see changes on your My Banner.
- 5 Once logged back in, on the left under Applications > My Banner > to see saved shortcuts.

