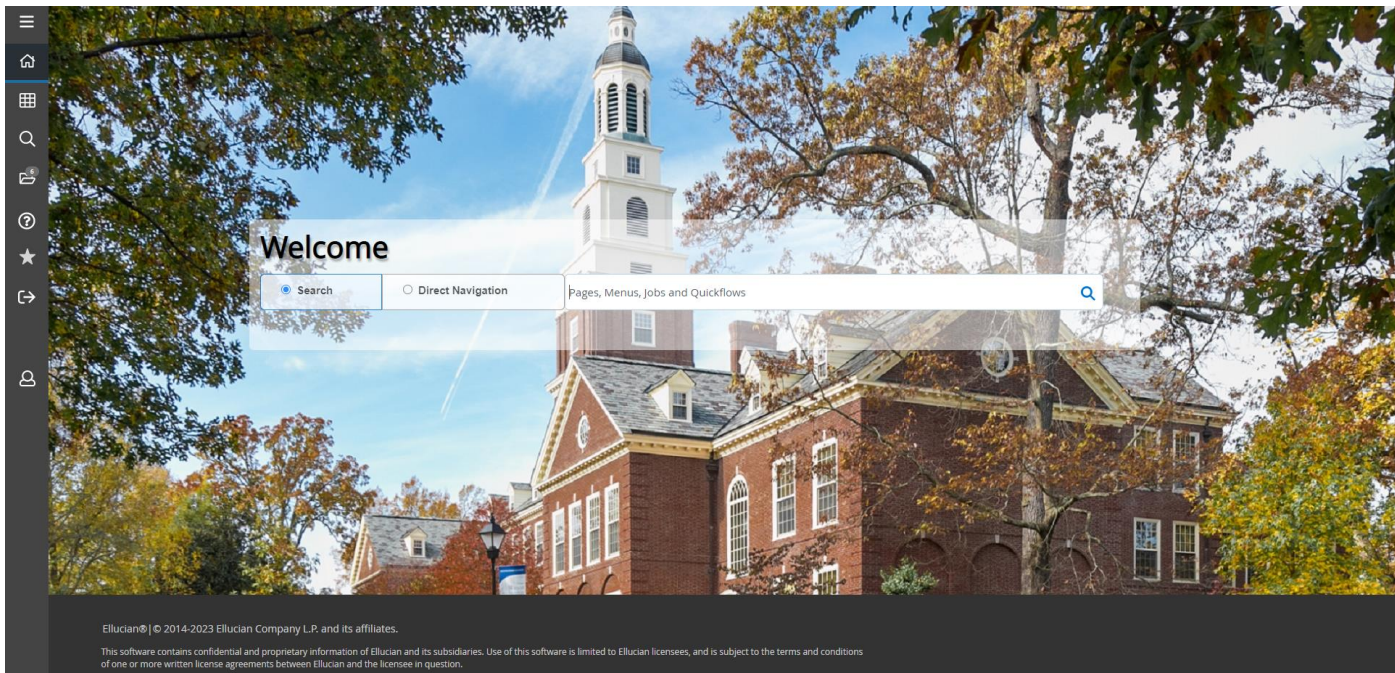


Banner 9 Navigation Reference Guide

Enterprise Systems
Information Technology
Berea College

Application Navigator – Welcome Page



Use your third partyID credentials to access the Banner 9 Welcome page. The Unified Menu is located on the left side of the page and is accessible from all pages within Banner 9. The Unified Menu icons provide the following functionality:

- **Toggle Menu icon** – The Toggle menu is identified with three horizontal lines. Click on this icon to expand the Unified Menu and include names of each icon.
- **Dashboard icon** (CTRL+Shift+X) – Clicking the Dashboard icon will bring the user back to Application Navigator (also known as the Welcome page, Landing page, Home page) from anywhere within Banner.
- **Applications icon** (CTRL+M) Click the Applications menu to bring up the Banner menu pages. The **My Banner** option is available from this icon to allow users to create a personal list of pages used regularly.
- **Search icon** (CTRL+Shift+Y) – The Search icon is identified by the magnifying glass. Selecting this icon will open a Search window. Users can then enter either the descriptive name of the page or the Banner acronym for the page.
- **Recently Opened icon** (CTRL+Y) – The Recently Opened icon is identified with a picture of a folder. It is activated upon opening the first Banner page and then will show the number of recently opened pages. Open the list and select a page to access it.
- **Help icon** (CTRL+Shift+L) – The Help icon is identified by the magnifying glass. Selecting this icon from a Banner page will open a separate browser window with information pertaining to that page.
- **Sign Out icon** (CTRL+Shift+F) – The Sign Out icon is identified by the lock. It is important to remember to use the Sign Out icon when closing the application **before** closing the browser.

Basic Navigation

The basic navigation of each 'Page' includes the page header, footer, key block, sections and tabs and the notification center.

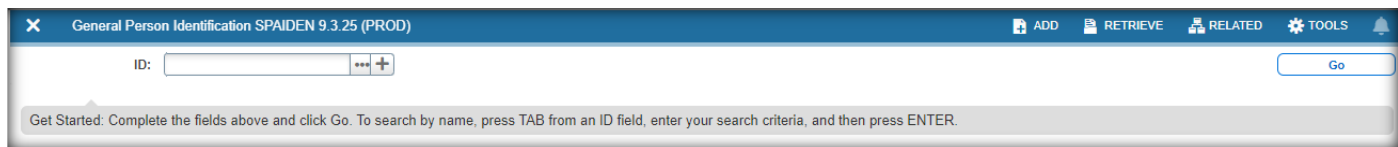
Page Header:



The page header is part of the basic navigation and contains the following items:

- **Page close icon "X"** (CTRL + Q) – Always use this icon to close the page.
- **Page title** – Includes description, acronym, version, database.
- **Add and Retrieve icons** – These icons are used with Banner's Document Management system.
- **Related Menu icon** – Displays a list of pages that are related and can be accessed from this page.
- **Tools Menu** – Will include refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.
- **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, active message count. Users can click number in the box of the page header to open or close the Notification Center.

Key Block:



To access the body of the page, populate the key block data and then click Go.

Users can return to the key block when in the body of a page by clicking Start Over.

Sections:



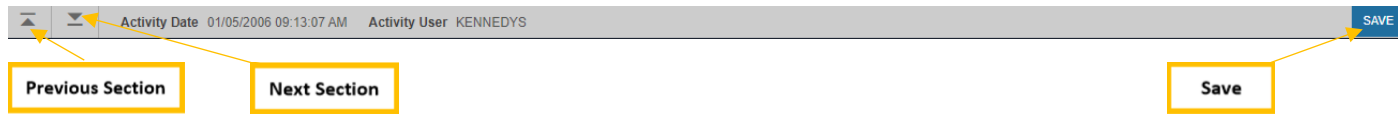
Pages are divided into Sections that contain additional details of the key information.

Sections of data can be opened or collapsed by clicking on the arrow on the far-left side of the section header. Some sections, as with this example, are accessed by using tabs that group information in a meaningful way.

If available, the sections can have a header 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.
- **Filter** – Use this to filter records in the section.

Bottom Section Navigation



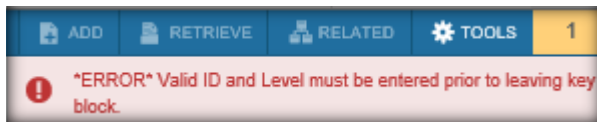
The bottom section of the page will contain icons to be used for navigation, perform functions, and display additional information.

- **Previous Section** – Will take user backwards in the sections (Alt+ Page Up).
- **Next Section** – Will take user to the next section of the page (Alt+ Page Down).
- **Activity Date** – This is the current system time stamped for the record when it was created or last modified.
- **Activity User** – Name of account user creating or modifying the record.
- **Save** – This button is used to save data.

Notification Center Messages:

There are three types of message notifications when working in Banner 9:

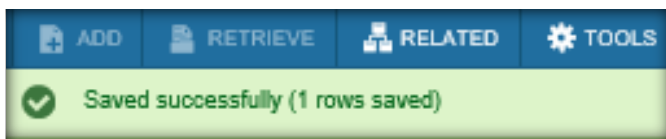
- **Error Notification** – Messages appear in 'red' and are a hard stop. Corrective action is required.



- **Warning Notification** – Messages appear in 'yellow' and may ask for acknowledgement to continue.



- **Success Notification** – Will display a checkmark in a circle when message is displayed.

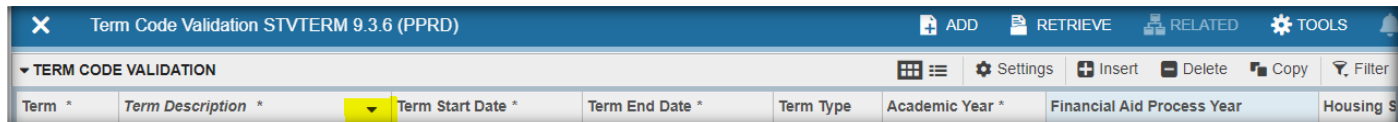


Required Fields:

An asterisk (*) displayed next to a field name indicates that the field requires a value before continuing on the page. If the user leaves 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 the user has chosen to sort the data, an up or down arrow next to the field name indicates the current sort order for the field. The user can click the field label to reverse the sort order.



Dates:

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].



A screenshot showing two date selection fields. The top field is labeled "From Date" and the bottom field is labeled "To Date". Each field has a text input area and a calendar icon to its right.

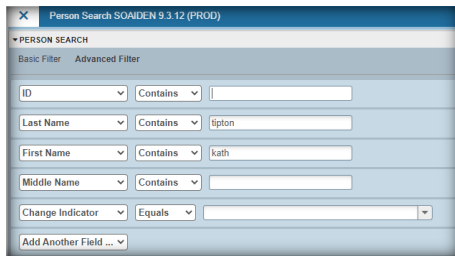
Filtering Data:

Users can also filter data in a section if there is an active Filter icon in the section header (upper right corner).



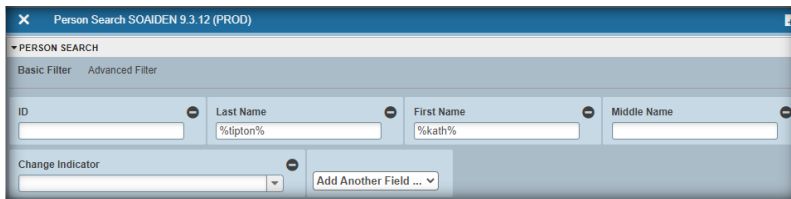
Use the following steps to filter data:

1. Click the active Filter icon.
2. Select Basic or Advanced filter options.
3. The Advanced option appears as following. Fill in the fields as needed or add another field. Select filtering criteria, such as Equals, Starts With, etc.,



A screenshot of the "Advanced Filter" dialog box in a software application. The dialog has a title bar "Person Search SOAIDEN 9.3.12 (PROD)" and a close button. Below the title bar, there are tabs for "Basic Filter" and "Advanced Filter". The "Advanced Filter" tab is active. It contains several rows of filter criteria, each with a dropdown menu for the field name, a dropdown menu for the filter type (all set to "Contains"), and a text input field. The criteria are: ID (empty), Last Name (contains "tjpton"), First Name (contains "kath"), Middle Name (empty), and Change Indicator (equals empty). There is also an "Add Another Field ..." button at the bottom.

Entered data remains if the filter option is changed back to Basic as shown below:



A screenshot of the "Basic Filter" dialog box in the same software application. The dialog has the same title bar and close button. Below the title bar, there are tabs for "Basic Filter" and "Advanced Filter". The "Basic Filter" tab is active. It shows the filter criteria entered in the previous screenshot, but now they are displayed in a more compact, grid-like format. The criteria are: ID (empty), Last Name (contains "%tjpton%"), First Name (contains "%kath%"), Middle Name (empty), and Change Indicator (equals empty). There is also an "Add Another Field ..." button at the bottom.

4. **Optional:** To add another field to the filter criteria, choose a field from the **Add Another Field** dropdown, and repeat previous steps. Repeat this until all filter criteria are entered.
5. After all filter criteria is entered, click **Go** (F8) to display the filter results. The number of records retrieved is displayed at the bottom of the section. Click the 'X' next to 'Filter Again' to get out of filtering.

Multiple Records:

Data can exist in multiple records of the same type and are displayed in multiple ways, for example addresses. 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. Users can move from record to record using pagination controls (the arrows located in the bottom left-hand corner).

General Person Identification SPADEN 9.3.25 (PROD)

ID: 800

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact Additional Identification

ADDRESS INFORMATION

From Date: 03/17/2022 To Date: []

Address Type: AD Advancement Address Telephone Type: AD Advancement Phone

Sequence Number: 4

Street Line 1: 619 Maple Grove Rd Street Line 2: Street Line 3: []

City: Richmond State or Province: KY Kentucky ZIP or Postal Code: 40475

County: KY151 Madison Nation: []

Area Code: [] Phone Number: [] Extension: []

Inactivate Address Source: HR Delivery Point: [] Correction Digit: [] Carrier Route: []

1 of 15 | Page

Record 1 of 15

Activity Date: 03/17/2022 02:27:29 PM Activity User: BORENSJ

Pagination Controls

In a Grid: In this instance, the data is presented in column and row format. Users may need to scroll to view all the data. Users can page through the records using the Pagination Controls, decide how many records to review in the grid, and sort the data in ascending or descending order by clicking on the arrows next to the column heading.

Term Code Validation STVTERM 9.3.6 (PROD)

TERM CODE VALIDATION

Term *	Term Description *	Term Start Date *	Term End Date *	Term Type	Academic Year *	Financial Aid Process Year	Housing Start Date *	Housing End Date *
999999	End of Time	12/11/4712	12/30/4712		9999	9999	05/18/4712	12/15/4712
202313	Summer 2024	05/13/2024	07/26/2024	Summer	2023	2324	05/13/2024	07/26/2024
202312	Spring 2024	01/10/2024	05/03/2024	Spring	2023	2324	01/10/2024	05/03/2024
202311	Fall 2023	08/23/2023	12/15/2023	Fall	2023	2324	08/23/2023	12/15/2023
202310	2023 Berea Bridge Program T...	06/20/2023	07/14/2023		2023	2324	06/20/2023	07/14/2023
202213	Summer 2023	05/15/2023	07/28/2023	Summer	2022	2223	05/15/2023	07/28/2023
202212	Spring 2023	01/11/2023	05/05/2023	Spring	2022	2223	01/11/2023	05/05/2023
202211	Fall 2022	08/24/2022	12/16/2022	Fall	2022	2223	08/24/2022	12/16/2022
202210	2022 Berea Bridge Program T...	06/14/2022	07/08/2022		2022	2223	06/14/2022	07/08/2022
202113	Summer 2022	05/16/2022	07/29/2022	Summer	2021	2122	05/16/2022	07/29/2022

1 of 31 | 10 Per Page

Record 1 of 303

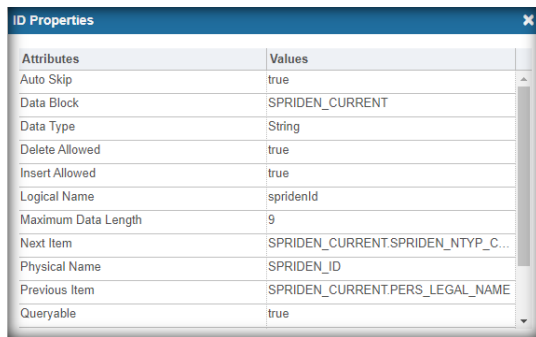
Page through options in grid format

Advanced Features

Item Properties

Item Properties lists all properties for the column/field where the cursor is currently located.

Item properties include the column's internal database name, whether the column is required, type of data (character or numeric), maximum length, and other characteristics of the field. The specific properties that are displayed depend on the type of field. To display Item Properties for a field, place the cursor in the field and select Tools > Item Properties.



Attributes	Values
Auto Skip	true
Data Block	SPRIDEN_CURRENT
Data Type	String
Delete Allowed	true
Insert Allowed	true
Logical Name	spridenid
Maximum Data Length	9
Next Item	SPRIDEN_CURRENT.SPRIDEN_NTYP_C...
Physical Name	SPRIDEN_ID
Previous Item	SPRIDEN_CURRENT.PERS_LEGAL_NAME
Queryable	true

My Banner Personal Menu Setup


Users can create a personal menu tied to your Banner user ID. Your personal menu will contain the pages you frequently use. Once the personal menu is created, you may access it from the Applications menu.

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

To add objects to your personal menu, type the page name in the right side under 'Object Selection' then select Save in the bottom right-hand corner to retain selections.

Users will have to sign out and back in to see changes on My Banner.

Banner "Buttons" Guide

Button	Description
Add and Retrieve	The Add and Retrieve are used with Banner's Document Management system.
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 going to a secondary or called page to retrieve data, the Select and Cancel are presented at the bottom right of the page.
Start Over	Use the Start Over button to return to the key block of the page.

Banner “Keyboard Shortcuts” Guide

	Action	Banner 9
	Application Navigator:	
1	Access Menu	Ctrl+M
2	Display recently opened items	Ctrl+Y
3	Search	Ctrl+Shift+Y
4	Sign out	Ctrl+Shift+F
5	Help	Cntl+Shift+L
6	Cancel Pages, Close Current Page, or Cancel Search/Query (in Query mode)	Ctrl+Q
7	Choose/Submit	Enter
8	Clear All in Section	Shift+F5
9	Clear One Record	Shift+F4
10	Clear Page or Start Over	Shift+F7
11	Count Query	Shift+F2
12	Delete Record	Shift+F6
13	Down/Next Record	Down Arrow
14	Duplicate Item	F3
15	Duplicate Selected Record	F4
16	Edit	Ctrl+E
17	Execute Filter Query	F8
18	Exit	Ctrl+Q
19	Expand/Collapse Drop-Down Field	Alt+Down Arrow
20	Export	Shift+F1
21	First Record or List	Ctrl+Home
22	Insert/Create Record	F6
23	Last Page	Ctrl+End
24	List of Values for Field	F9
25	More Information	Alt+Shift+U
26	Next field or Item	Tab
27	Next Page Down	Page Down
28	Next Tab or Page	Alt+Page Down
29	Open Menu Directly	Ctrl+M
30	Open Related Menu	Alt+Shift+R
31	Open Tools Menu	Alt+Shift+T
32	Page Tab 1, Page Tab 2, and so on . . .	Ctrl+Shift+1 Ctrl+Shift+2 (and so on)
33	Previous Field or Item	Shift+Tab
34	Previous Page Up	Page Up
35	Previous Tab or Page	Alt+Page Up
36	Print	Ctrl+P
37	Refresh or Rollback	F5
38	Save	F10
39	Search or Open Filter Query	F7
40	Select on a Called Page	Alt+S
41	Toggle Multi/Single Records View	Ctrl+G
42	Up/Previous Record	Up Arrow