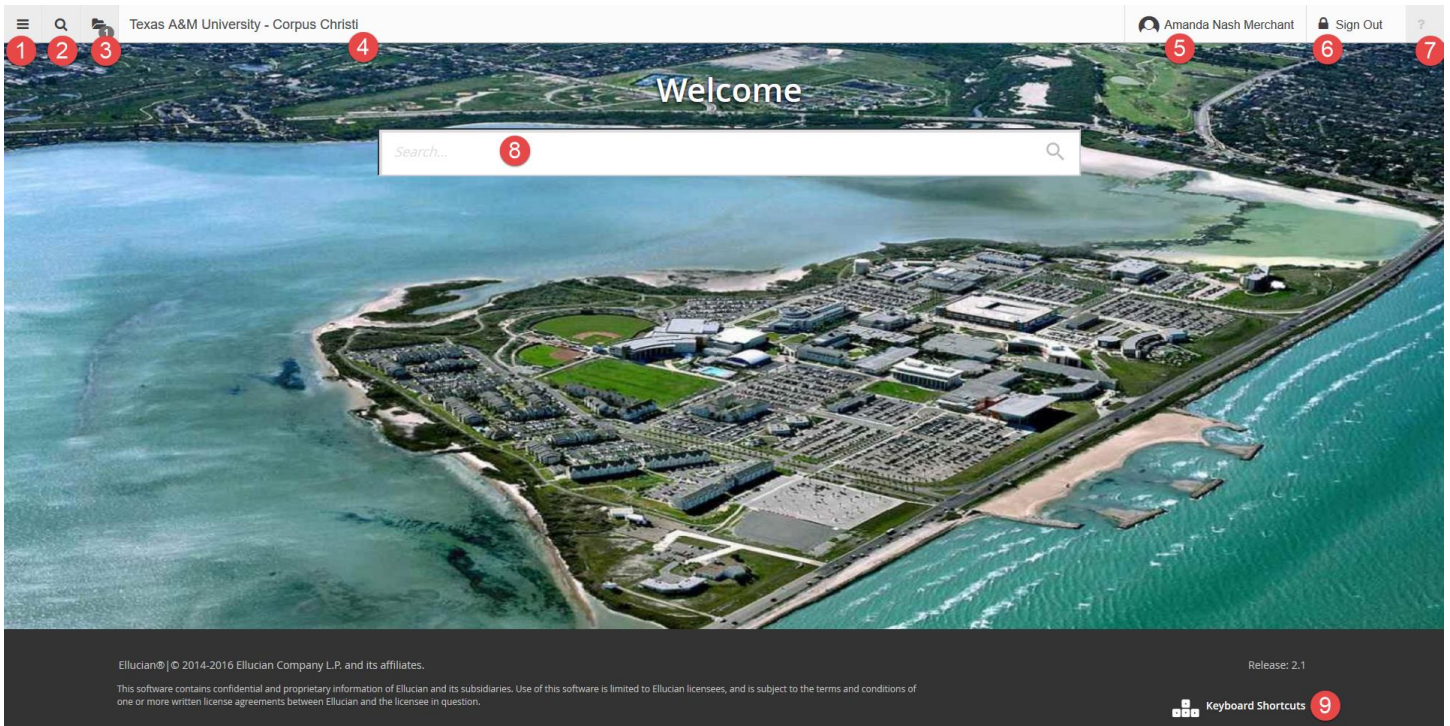


Banner 9 Navigation

Landing Page (or Ban9 'AppNav')



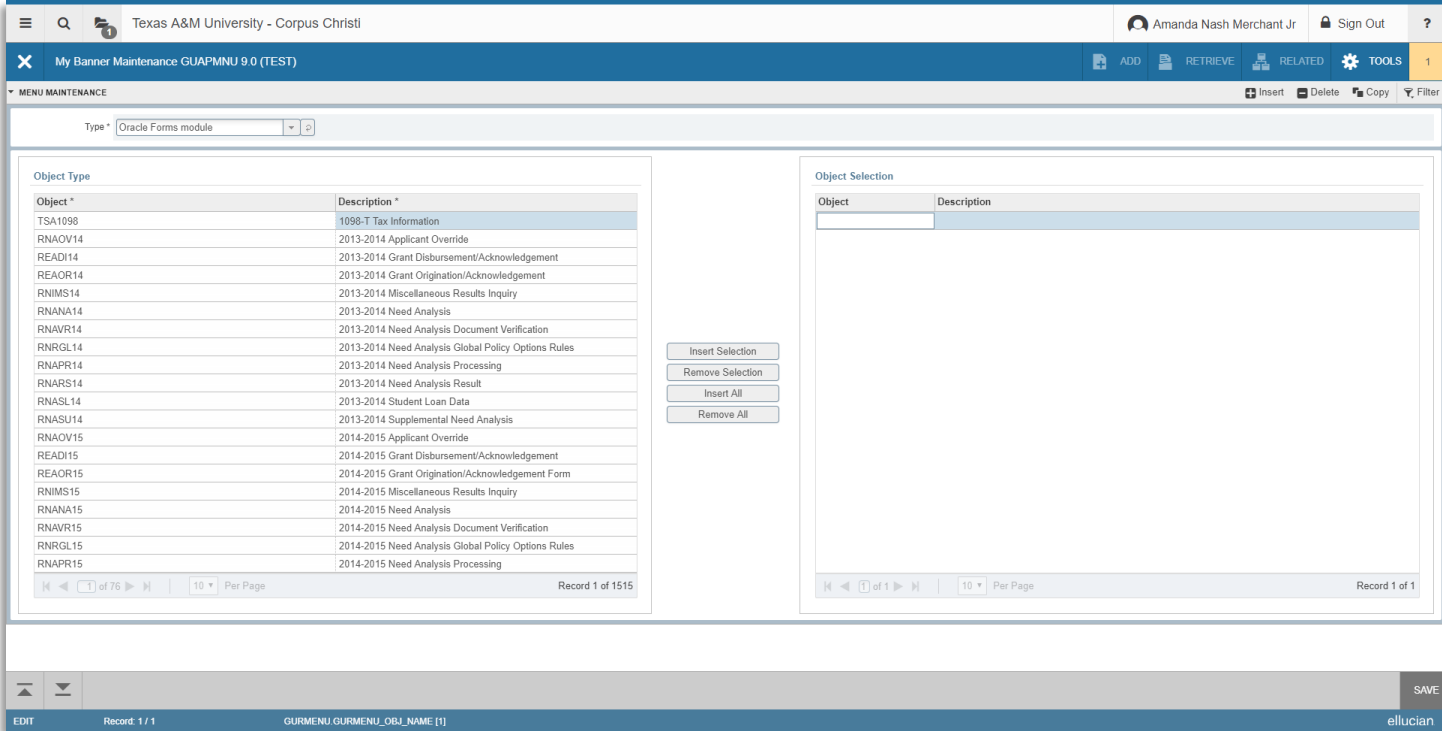
- 1 **Menu Icon:** Click on this icon to open the Banner Menu. Find the page you are interested in opening. Select the desired entry and click Enter.
- 2 **Search Icon:** Click on this icon to open the Search window. You can then enter either the descriptive name of the page or the Banner acronym for the page.
- 3 **Recently Opened Icon:** This is displayed with a count of pages after you have opened the first page in an application. Open the list and select a page to access it.
- 4 **Home Page:** You can return to the Application Navigator landing page by clicking on the home link.
- 5 **Banner User Name:** Displays the Banner Username of the person logged into this account.
- 6 **Sign Out Link:** Click the link when closing the application instead of just closing your browser to make sure you are logged out of the application.
- 7 **Help Icon:** The help lights up when you are on an option that has help pointers available; it will display info about the page you are currently viewing.
- 8 **Search Box:** In this box, you enter either the descriptive name of the page or the Banner acronym for the page. Find the desired entry and click Enter.
- 9 **Key Board Shortcuts:** Click on this icon to display the list of Application Navigator page keyboard shortcuts.

Banner 9 Navigation

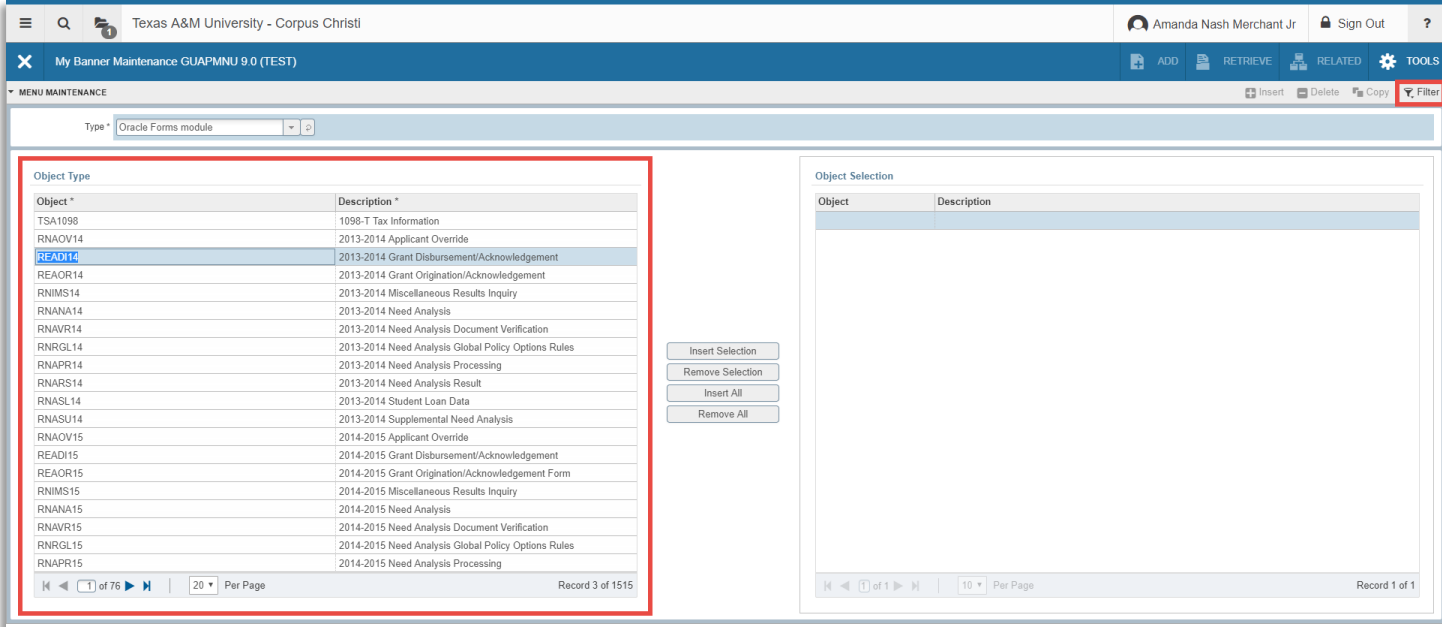
My Banner Menu

If you have a My Banner Menu in Banner 8, it should also appear in Banner 9. If you don't see it or want to create a My Banner menu, follow these steps:

- 1. Go to the **GUAPMNU** page.



- 2. Click into the Object Type box in order to begin searching for your forms/pages. You can use the Filter function to narrow down your search.



3. Double click on the pages you want to appear in My Banner and click the **Insert Selection** button.

Object Type

Object *	Description *
SOAADAS	Administrator Rule Rules
SOAAINF	Administrators Assignments
STVAPDC	Admission Application Decision Code Validation
STVAPST	Admission Application Status Code Validation
SAAACKL	Admission Application/Checklist Summary
STVADMR	Admission Request Checklist Code Validation
STVTSRC	Admission Test Score Source Code Validation
STVADMT	Admission Type Code Validation
SAAADMS	Admissions Application
RSIAPPL	Admissions Application Inquiry
SAASUMI	Admissions Application Summary
SAACHKB	Admissions Checklist Rules
SAADCRV	Admissions Decision
SAADCSN	Admissions Decision Rules
SAADCBT	Admissions Decision and Rating Batch Entry
STVAFCT	Admissions Factor Code Validation
SAAMAPP	Admissions Mass Entry
SAARRAT	Admissions Rating
SAARRFT	Admissions Rating Factor Rules
SAARRDF	Admissions Rating Formula Definition

Object Selection

Object	Description
SAAADMS	Admissions Application

Buttons: Insert Selection, Remove Selection, Insert All, Remove All

4. Click Save or hit F10 when you are finished. You will need to logout and log back in to see the My Banner menu appear.

BANNER >

MY BANNER >

Welcome

Search...

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Keyboard Shortcuts

Banner 9 Navigation

Page Layout

The screenshot shows the Banner 9 user interface for a 'General Person Identification SPAIDEN 9.3 (BANXE)'. The interface is divided into several sections, each with a header and a list of fields. The sections are: IDENTIFICATION, PERSON, NON-PERSON, ID AND NAME SOURCE, and Original Creation. The user is logged in as Amanda Nash Merchant. The interface includes a navigation bar at the top, a page header, and a footer with activity information and a 'SAVE' button.

1. Basic Navigation Header: Includes the Menu icon, Search icon, Recently opened icon, Home Page link, Banner user name, Sign Out link and Online Help icon.

2. Page Header: Contains the following:
-Page close icon "X" to close your page.
-Page title
-Release and Submit buttons used only with workflows.
-Add and Retrieve icons: actions used with Banner Document Management.
-Related Menu button: displays a list of pages that are accessed from this page.
-Tools Menu, which includes refresh, export, print, clear record, item properties, display ID image, etc.
-Notification Center: which is located to the right of the Tools menu, and displays the following types of information: Successful data save, Warning messages, Error Messages, Informational messages, number of messages to be corrected to continue in the page. Note: You may click in the box with the number in the page header to open or close the Notification Center.

3. Key Block: The first block on most pages and contains key information. The key block determines what data is entered or displayed on the rest of the page.

4. Sections: Pages are divided into sections. They can be opened or collapsed by clicking on the carrot icon on the far left side of the section header. If available, a section may have a header that includes icons for actions you can do to records in the section: Insert, Delete, Copy, and Filter. The More Information icon will appear if supplemental data can be or is already entered for the record.

5. Sections Navigation Function: At the bottom of the section you may see some button icons and a display of information about the page. The arrows allow you to go to the next section (next block) or previous section.

1 **Basic Navigation Header:** Includes the Menu icon, Search icon, Recently opened icon, Home Page link, Banner user name, Sign Out link and Online Help icon.

2 **Page Header:** Contains the following:
-Page close icon "X" to close your page.
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-Release and Submit buttons used only with workflows.
-Add and Retrieve icons: actions used with Banner Document Management.
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3 **Key Block:** The first block on most pages and contains key information. The key block determines what data is entered or displayed on the rest of the page.

4 **Sections:** Pages are divided into sections. They can be opened or collapsed by clicking on the carrot icon on the far left side of the section header. If available, a section may have a header that includes icons for actions you can do to records in the section: Insert, Delete, Copy, and Filter. The More Information icon will appear if supplemental data can be or is already entered for the record.

5 **Sections Navigation Function:** At the bottom of the section you may see some button icons and a display of information about the page. The arrows allow you to go to the next section (next block) or previous section.

Banner 9 Navigation

Viewing Multiple Records

You can move from one record to another in a section by using the pagination controls. To view multiple records at a time, use the Per Page drop-down to select the number of records to view at one time.

The screenshot shows the Banner 9 interface for a user record. The top navigation bar includes the user's name, 'Amanda Nash Merchant', and a 'Sign Out' button. Below the navigation bar, there are tabs for 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', 'Emergency Contact', and 'Additional Identification'. The 'E-mail' tab is selected, and the 'E-MAIL INFORMATION' section is expanded. The first record is visible, showing an 'E-mail Type' of 'TAMUCC Employee', an 'E-mail Address' of 'amanda.merchant@tamucc.edu', and a 'Comment' of 'mandatory university email address'. At the bottom of the record list, there are pagination controls: a left arrow, a page number '3' of '3', a right arrow, and a 'Per Page' dropdown menu set to '1'. The text 'Record 3 of 3' is visible in the bottom right corner.

Or view multiple records at one time by using the Per Page drop-down.

The screenshot shows the Banner 9 interface for a user record. The top navigation bar includes the user's name, 'Amanda Nash Merchant', and a 'Sign Out' button. Below the navigation bar, there are tabs for 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', 'Emergency Contact', and 'Additional Identification'. The 'E-mail' tab is selected, and the 'E-MAIL INFORMATION' section is expanded. The first record is visible, showing an 'E-mail Type' of 'University Student (Islander accounts only)', an 'E-mail Address' of 'amanda.merchant@tamucc.edu', and a 'Comment' of 'mandatory university email address'. Below this record, there are two more records with 'E-mail Type' of 'Business' and 'TAMUCC Employee'. At the bottom of the record list, there are pagination controls: a left arrow, a page number '1' of '1', a right arrow, and a 'Per Page' dropdown menu set to '5'. The text 'Record 1 of 3' is visible in the bottom right corner. At the bottom of the page, there is a footer with 'Activity Date 04/17/2017 12:05:04 PM', 'Activity User ADMIREC', and a 'SAVE' button.

Banner 9 Navigation

Person Search

1. Place your cursor in the ID field.

The screenshot shows the Banner 9 Person Search interface. The top navigation bar includes the user name 'Amanda Nash Merchant' and a 'Sign Out' button. The main header displays 'General Person Identification SPAIDEN 9.3.6 (BANXE)'. Below the header, there is an 'ID:' label followed by an empty text input field and a magnifying glass icon. A 'Go' button is located to the right of the input field. A grey instruction bar at the bottom reads 'Get Started: Fill out the fields above and press Go.'

2. Hit the **Tab** key and type name text into the field that appears. Hit **Enter**.

This screenshot shows the same Banner 9 Person Search interface as the previous one, but with the text 'Merchant, A%' entered into the ID field. The 'Go' button remains to the right of the field. The instruction bar at the bottom is still present.

3. In the ID and Name Extended Search popup you have several options.

The screenshot shows the Banner 9 Person Search interface with the 'ID and Name Extended Search SGASTDN 9.3.6 (BANXE)' popup window open. The popup contains several sections: 'Search Detail' with buttons for 'Press To See Results', 'Person Search Detail', and 'Non-Person Search Detail'; 'Reduce Search By' with radio buttons for 'Group Type' (Person, Non-Person, Both) and input fields for 'Name Type', 'City', 'State or Province', 'ZIP or Postal Code', 'Birth Date', and 'Gender'. At the bottom of the popup, there are instructions: 'Press Enter Query or select button to clear search.' and 'Enter search criteria then press Execute Query or select button to reduce search.' The main interface behind the popup shows 'General Student SGASTDN 9.3.6 (BANXE)' and a 'Go' button. The bottom status bar includes 'EDIT', 'Record: 1/1', and 'ellucian'.

- a. Filter your results by entering data into 'Reduce Search By' area and then clicking the Reduce Search button (magnifying glass button).

re and press Go.

ID and Name Extended Search

Search Detail

Person/Non-Person Count 5

Reduce Search By

Group Type Person Non-Person Both

City

State or Province

ZIP or Postal Code

Name Type

Birth Date

Gender

Press Enter Query or select button to clear search.

Enter search criteria then press Execute Query or select button to reduce search.

b. Click the 'Press to See Results' button to see the Extended Search results

Texas A&M University - Corpus Christi

Amanda Nash Merchant Sign Out

General Person Identification SPAIDEN 9.3.6 (BANXE)

ADD RETRIEVE RELATED TOOLS

ID:

Get Started: Fill out the fields above and press Go.

ID and Name Extended Search

Search Detail

Reduce Search By

Group Type Person Non-Person Both

City

State or Province

ZIP or Postal Code

Press Enter Query or select button to clear search.

Enter search criteria then press Execute Query or select button to reduce search.

Extended Search

Criteria

Name and ID
Merchant, A
Merchant, A
Merchant, A
Merchant, A
Merchant, A
Merchant, A
Merchant, A
Merchant, A
Merchant, A
Merchant, A

20 Per Page Record 1 of 15

c. Click the 'Person Search Detail' button to bring up SOAIDEN search results.

Texas A&M University - Corpus Christi

Amanda Nash Merchant Sign Out

Person Search SOAIDEN 9.3.5 (BANXE)

ADD RETRIEVE RELATED TOOLS

Performing Query On Name: A% MERCHANT

PERSON SEARCH

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
A	Merchant	A						
A	Merchant	A	H					
4	Merchant	A			ID Change			LGCY
A	Merchant	A	P		ID Change			
9	Merchant	A	P					
A	Merchant	A	G					
4	Merchant	A			ID Change	MS		LGCY
A	Merchant	A			ID Change	MS		UIN
1	Merchant	A	Nash					
A	Merchant	A	Nash					
A	Merchant	A	M					
1	Merchant	A	P		ID Change			
A	Merchant	A	P					
A	Merchant	A	R					

20 Per Page Record 1 of 15

Case Insensitive Query Case Sensitive Query

Banner 9 Navigation

Query/Filter Data

You can filter data in a section when there is an active Filter icon in the section header or when a page opens in query mode.

1. Click the active **Filter** icon in the section or **F7** to bring up the filters.

The screenshot shows the Banner 9 interface for 'Curriculum Rules SOACURR 9.3.2 (BANXE)'. The top navigation bar includes the university name 'Texas A&M University - Corpus Christi', the user 'Amanda Nash Merchant', and a 'Sign Out' button. The section header has a blue bar with 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' icons. Below the header, there's a 'Term: 201709 Fall 2017' and a 'Start Over' button. The main content area shows a table with columns: Base Rule Number, Program, Level, Campus, College, Degree, Effective Term, Primary, Secondary, and Locked. A 'Filter' icon in the top right of the table area is circled in red.

The screenshot shows the Banner 9 interface for 'Person Search SOAIDEN 9.3.3 (BANXE)'. The top navigation bar is the same as the previous screenshot. The section header has a blue bar with 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' icons. Below the header, there's a green message box that says 'Enter a query, press F8 to execute.' A red callout bubble points to the 'Add Another Field ...' dropdown menu. The 'Clear All' and 'Go' buttons are visible at the bottom right.

2. Select the fields you want to filter on from the **Add Another Field** drop-down list. Choose an Operator from the **Contains** drop-down list.

The screenshot shows the Banner 9 interface for 'Person Search SOAIDEN 9.3.3 (BANXE)'. The 'Add Another Field ...' dropdown menu is open, showing a list of fields: 'Last Name', 'ID', 'First Name', 'Middle Name', 'Change Indicator', and 'Name Type'. The 'Contains' dropdown menu is also open, showing the operator 'Contains'. The 'Case Sensitive Query' radio button is selected.

The screenshot shows the Banner 9 interface for 'Person Search SOAIDEN 9.3.3 (BANXE)'. The search results are displayed, showing 'Last Name' and 'First Name' filters. The 'Last Name' filter is set to 'Merchant' and the 'First Name' filter is set to 'A%'. The 'Case Sensitive Query' radio button is selected.

3. Click **Go** or **F8** to display the filter results.

Banner 9 Navigation

Running a Report and Viewing Output

NOTE: If you run a process and normally retrieve output from WINSOCP, you will go to the same folders to get the data as you did using Banner 8.

1. Type in Report name in Search Box or under Search Icon. Press enter.
2. PRESS **GO** (right side of the page). Or, **ALT + Page Down** to get to the next block/section.

Process: Parameter Set:

Get Started: Fill out the fields above and press Go.

3. Type in DATABASE in Printer block.
4. Select **ARROWS on Bottom Left** or use **ALT+PAGE DOWN** to next block.
5. Enter any parameters on right side of the section.
6. Select **ARROWS on Bottom Left** or use **ALT+PAGE DOWN** to next block.
7. Select **Save (bottom Right)** or press **F10**.

Process: SZPTSPU TSI Update Process Parameter Set:

PRINTER CONTROL

Printer: Lines:
Special Print: Submit Time:

PARAMETER VALUES

Number *	Parameters	Values
01	Term code	201709
02	ID	
03	Application ID	STUDENT
04	Selection ID	AMANDA_TEST
05	Creator ID	AMERCHANT
06	User ID	AMERCHANT
07	Record Delete	Y

SUBMISSION

Save Parameter Set as
Name: Description:
Hold / Submit: Hold Submit

EDIT Record: 1/1 SUBMIT_BLK.SUBMIT_PPRM_DESC [1] ellucian

8. Select **RELATED** or **CTRL+SHIFT+R** to view Review Output form/page.

Process: Parameter Set:

Get Started: Fill out the fields above and press Go.

RELATED

Saving current parameter values as AMANDA_TEST.
Log file: szptspu_3516423.log List file: szptspu_3516423.lis

Banner 9 Navigation

Shortcut Keys – PC workstations

Bold entries indicate actions with keyboard combinations that are new or updated in Banner 9.

Action	Banner 8	Banner 9
Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL+Q	CTRL+Q
Change MEP Context	Not applicable	ALT+SHIFT+C
Choose/Submit	ENTER	ENTER
Clear All in Section	SHIFT+F5	SHIFT+F5
Clear One Record/Clear Record	SHIFT+F4	SHIFT+F4
Clear Page or Start Over/Rollback	SHIFT+F7	F5
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/Execute Query	F8	F8
Exit	CTRL+Q	CTRL+Q
Expand/Collapse Drop-down Field	Click field	ALT+Down Arrow
Export	Extract Data with Key or Extract Data no Key	SHIFT+F1
First Page	Not applicable	CTRL+Home
Insert/Create Record	F6	F6
Last Page	Not applicable	CTRL+End
List of Values	F9	F9
More Information	ALT+H	CTRL+SHIFT+U
Next Field or Item	Tab	Tab
Next Page Down	Page Down	Page Down
Next Section/Next Block	CTRL+Page Down	ALT+Page Down
Open Menu Directly	F5	CTRL+M
Open Related Menu	Not applicable	ALT+SHIFT+R
Open Tools Menu	Not applicable	ALT+SHIFT+T
Page Tab 1, Page Tab 2 and so on	Not applicable	CTRL+SHIFT+1, CTRL+SHIFT+2, and so on
Previous Field or Item	SHIFT + TAB	SHIFT + TAB
Previous Page Up	Page Up	Page Up
Previous Section/Previous Block	CTRL+Page Up	ALT+Page Up
Print	SHIFT+F8	CTRL+P
Refresh or Rollback	SHIFT+F7	F5
Save	F10	F10
Search or Open Filter Query/Enter Query	F7	F7
Select on a Called Page	SHIFT+F3	ALT+S
Toggle Multi/Single Records View	Not applicable	CTRL + G

Up/Previous record	Up Arrow	Up Arrow
Workflow		
Release Workflow	Icon or Menu	ALT+Q
Submit Workflow	Icon or Menu	ALT+W
Application Navigator		
App Nav - Access Help		CTRL+SHIFT+L
App Nav - Access Menu		CTRL+M
App Nav - Display recently opened items		CTRL+Y
App Nav - Search		CTRL+SHIFT+Y
App Nav - Sign out		CTRL+SHIFT+F

Banner 9 Navigation

Shortcut Keys – **MAC workstations**

Bold entries indicate actions with keyboard combinations that are new or updated in Banner 9.

Action	Banner 8	Banner 9
Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL+Q	CTRL+Q
Change MEP Context	Not applicable	ALT+SHIFT+C
Choose/Submit	ENTER	ENTER
Clear All in Section	SHIFT+F5	SHIFT+F5
Clear One Record/Clear Record	SHIFT+F4	SHIFT+F4
Clear Page or Start Over/Rollback	SHIFT+F7	F5
Count Query	SHIFT+F2	SHIFT+F2
Delete Record	SHIFT+F6	SHIFT+F6
Down/Next Record	Down Arrow	Down Arrow
Duplicate Item	F3	fn + F3
Duplicate Selected Record	F4	fn + F4
Edit	CTRL+E	CTRL+E
Execute Filter Query/Execute Query	F8	fn + F8
Exit	CTRL+Q	CTRL+Q
Expand/Collapse Drop-down Field	Click field	ALT+Down Arrow
Export	Extract Data with Key or Extract Data no Key	SHIFT+ fn + F1
First Page	Not applicable	CTRL+Home
Insert/Create Record	F6	F6
Last Page	Not applicable	CTRL+End
List of Values	F9	fn + F9
More Information	ALT+H	CTRL+SHIFT+U
Next Field or Item	Tab	Tab
Next Page Down	Page Down	Page Down
Next Section/Next Block	CTRL+Page Down	ALT+Page Down
Open Menu Directly	F5	CTRL+M
Open Related Menu	Not applicable	ALT+SHIFT+R
Open Tools Menu	Not applicable	ALT+SHIFT+T
Page Tab 1, Page Tab 2 and so on	Not applicable	CTRL+SHIFT+1, CTRL+SHIFT+2, and so on
Previous Field or Item	SHIFT + TAB	SHIFT + TAB
Previous Page Up	Page Up	Page Up
Previous Section/Previous Block	CTRL+Page Up	ALT+Page Up
Print	SHIFT+F8	CTRL+P
Refresh or Rollback	SHIFT+F7	F5
Save	F10	fn + F10
Search or Open Filter Query/Enter Query	F7	fn + F7
Select on a Called Page	SHIFT+F3	ALT+S
Toggle Multi/Single Records View	Not applicable	CTRL + G

Up/Previous record	Up Arrow	Up Arrow
Workflow		
Release Workflow	Icon or Menu	ALT+Q
Submit Workflow	Icon or Menu	ALT+W
Application Navigator		
App Nav - Access Help		CTRL+SHIFT+L
App Nav - Access Menu		CTRL+M
App Nav - Display recently opened items		CTRL+Y
App Nav - Search		CTRL+SHIFT+Y
App Nav - Sign out		CTRL+SHIFT+F