Banner Navigation

Contents

Updated August 2018

Banner 9 – Application Navigator
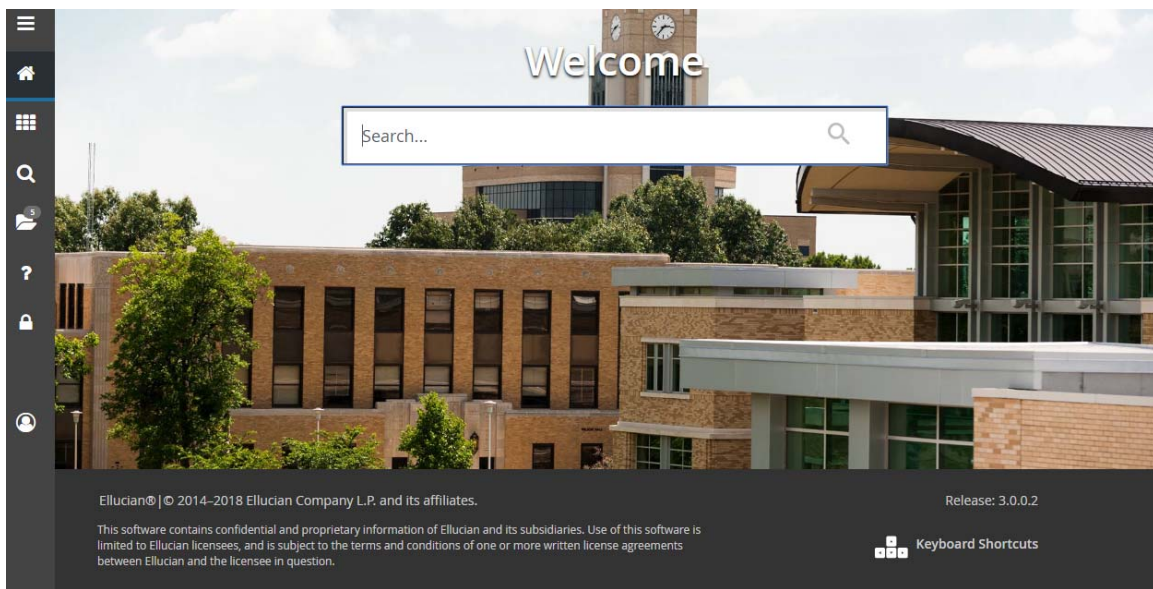
The Application Navigator is the main menu of Banner 9. It will allow you to access all of the pages within the system.

Menu
1. Located in upper left corner of the main screen.
2. Click on the 3 Bars icon to show the Icon Descriptions.
3. Click on the Dashboard icon (house) to go back to the Application Navigator main screen, which has the Search Box for Banner pages.
4. Click on the Applications icon (9 squares) to access the Banner menu or the My Banner Menu.
   a. Click on the Banner link to access the general menus, which can include forms for the sections of Student, Advancement, Finance, Human Resources, Financial Aid, and General.
   b. Click on the MyBanner link to access the forms that you included in your MyBanner section of Banner 8. This list is compiled by you in order to easily access forms that you use on a regular basis. To add or subtract any forms, please refer to the 'Personalizing My Banner Menu' instructions later in this chapter.
   c. Click on the Search icon (magnifying glass) to bring up a search bar where you can search by either the page name or the description. For example, the form that creates requisitions (FPAREQN) can be found by typing in a combination of the letters or the word 'requisition'.

5. Click on the Recently Opened icon (file folder) to bring up a list of Banner pages that you accessed within the current session. Click on the one that you would like to access.
6. Click on the Online Help icon (question mark) to bring up Ellucian's online help database.
7. Click on the Sign Out icon (padlock) to log out of Banner 9.

Search Bar – Like the search icon, the search bar is where the user can search by either the page name or the description. For example, the form that creates requisitions (FPAREQN) can be found by typing in a combination of the letters or the word 'requisition'.

What is a Banner Page?

A Banner page (previously called a form) is an online document where you can enter and look up information in your database. A page visually organizes information so it is easier to enter and read. A Banner page is similar to a paper form, except information is entered once and then used by other pages, reports, and jobs.

Basic Navigation

All Banner pages consist of the Page Header, the Key Block, Sections, Notification Center, and Buttons.

Page Header

The page header includes:

1. Page close icon "X" – Use the "X" to close the page
2. Page title – Includes description, acronym, version, and database
3. Related Menu button – Shows a list of Banner pages that can be accessed with the current page
4. Tools Menu button – Shows a list of options available with the current screen, including printing and other functions appropriate for the page
5. Notification Center – When necessary, a box with a number in it will appear to the right of the Tools Menu Button. Click on the box to display information about the

successful completion of tasks, warning/error messages, and informational messages. Once you are done with the message, click on the box with the number in it to close the Notification Center.

Key Block

The Key Block includes:

1. The first information that the user enters into the form.
2. The unique code of the document, including ID numbers, term codes, or document numbers.
3. Other basic information that pertains to the entire document.

The Key Block information remains visible when subsequent sections are brought up in the page, but the user cannot change the information unless the Key Block is reopened by clicking on the Start Over button at the upper right corner of the screen.
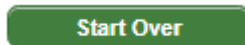

Sections

After the key block, pages are separated into sections that contain additional information. Records can be inserted, deleted, copied, or filtered using the icons in the upper right of the section:

Users can also access multiple sections by using the arrows at the bottom left corner of the screen:

Or, the user can click on the appropriate tab in the red and pink bar at the top of the section:

| Requestor/Delivery Information | Vendor Information | Commodity/Accounting | Balancing/Completion |
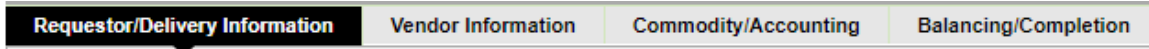
Types of Pages

Application – Used to enter, update, and query information in Banner. This is the most common type of page.

Example – Requisition Page (FPAREQN)

Inquiry – Used to look up existing information. You can access an inquiry page from the main menu or from another page with the Related Menu.

Example: Requisition Inquiry (FPIREQN)

✕ Requisition Query FPIREQN 9.0 (RACT)		📄 ADD 📄 RETRIEVE 👥 RELATED ⚙ TOOLS	
Requisition: R0250254			Start Over

REQUISITION INQUIRY: DOCUMENT INFORMATION ⊞ Insert ⊟ Delete ⧉ Copy ▾ Filter

Requisition	R0250254		☐ In Suspense		✓ Document Text	
Order Date	06/19/2018	Delivery Date	06/19/2018	Commodity Total	23.29
Transaction Date	06/19/2018	Comments	CONFIRMING	Accounting Total	23.29

REQUISITION INQUIRY: DOCUMENT INFORMATION ⊞ Insert ⊟ Delete ⧉ Copy ▾ Filter

			Cancel Reason	
	✓ Complete		Document Type	P PROCUREMENT
	✓ Approved		✓ NSF Checking	
Print Date	06/22/2018		☐ Deferred Editing	
Cancel Date			Requisition Copied From	R0249818
Closed Date	06/22/2018		Origin	BANNER
Activity Date	06/22/2018		Reference Number	
User ID				

Validation – Used to define the values that can be entered in specific fields on application validation, or rule pages. These values make up a field's List of Values (LOV).

Example: Ship-to Codes (FTVSHIP)

✕ Ship To Validation FTVSHIP 9.0 (RACT)	📄 ADD 📄 RETRIEVE 👥 RELATED ⚙ TOOLS	

SHIP TO VALIDATION ⊞ Insert ⊟ Delete ⧉ Copy ▾ Filter

Ship To Code	Contact Name	Effective Date	Termination Date	Building	Floor	Area Code	Phone Number	Extension
007210	Agricultural Farm Office	01/01/2001		Farm Shop				
007210	Agricultural Farm Office	09/02/2010		Farm Shop		870	9723836	
007310	Nathan Wells	01/11/2012		Equine		870	9722053	
007310	Equine	07/07/2014		Equine		870	9722053	
007510	Printing Services	01/01/2001		c/o Central Rec				
007510	Printing Services	09/07/2010		C/O Central Rec		870	9722072	
007510	Printing Services	02/10/2018		Ed-Comm Bldg		870	9722072	
007740	Military Science And Leadershi	01/01/2001		Armory Rm 128				
007740	Military Science And Leadership	09/07/2010		Armory Rm 128				
007740	Military Science And Leadership	03/29/2017		Armory Rm 128				
007740	Military Science And Leadership	03/29/2017		Armory Rm 128				
007860	Student Union	01/01/2001		Student Union	Rm 2008			
007860	Student Union	09/02/2010		Student Union	Rm 2008	870	9722056	
007860	Student Union	03/29/2017		Student Union	Rm 2008	870	9722056	
007870	Jennifer French	08/30/2013		c/o Central Rec	2713 Pawne	870	9723734	
007870	Rm 143 Library	07/07/2014		c/o Central Rec	2713 Pawne	870	9723734	
007870	Rm 143 Library	02/23/2015		c/o Central Rec		870	9723734	
007890	Ctr for Economic Development	01/01/2001						
007890	Ctr for Economic Development	09/02/2010				870	9723850	
007890	Ctr for Economic Development	02/19/2015	02/19/2015			870	9723850	

⏮ ◀ 1 of 30 ▶ ⏭ 20 ▾ Per Page		Record 1 of 591

Banner uses LOVs to validate many fields. When the cursor is in a field that must be validated but isn't filled in or has incorrect information, the field will turn red and a message appears in the upper right corner of the screen. Use the button with three dots next to the field that needs to be filled to search for the correct value.

Accessing Pages

The following is used to access a page from the Application Navigator:

1. Applications icon (9 squares)
   a. Banner Menu
   b. My Banner Menu, which can be set up through GUAPMNU
2. Search Bar in Application Navigator
3. Search Icon in the Menu of the Application Navigator
4. List of forms accessed during current session stored in the File Menu
   a. From the Application Navigator screen, click on the File Folder Icon:
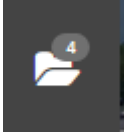
5. Banner brings up a list of forms that have been used in the current session. The user can choose the correct form.

How to Filter

1. Click on the Filter icon.

2. Banner will bring up a Basic Filter option.

3. Fill in the fields that you know, and use 'Add Another Field' if there are other criteria that you would like to use in the filter.
4. Click the 'Go' button.
5. If you would like to create a more detailed filter, click the 'Advanced Filter' link in the upper left corner.
6. Banner will bring up a new menu that allows you to choose more criteria and qualifiers.

7. Choose the qualifier that best meets the search criteria. For example, if you are looking for a fund that starts with the numbers 150, you would choose 'Starts With' and then type in 150 in the search field.
8. If you would like to add another criteria, click on the dropdown entitled 'Add Another Field', which will include the fields that are part of the page that the you are searching. You can continue to choose qualifiers and enter search criteria until you have chosen all of the field types.
9. Once you have finished entering in the field, click on the 'Go' button at the bottom right corner of the screen.
10. Banner will list all of the items that match your search criteria. Once you find the correct item, click on the 'Select' button at the bottom right corner of the screen and Banner will fill in your field with your selection.
11. If you don't find the right information, you can click the 'Cancel' button to take you back to the Banner page.

Personalizing My Banner Menu

1. Open the page GUAPMNU.

2. Double Click in the **Object Field** on the right-hand side of the form.
3. Choose the 'Insert Selection' button.
4. Click the 'Save' button when you are done.
5. After you finish setting up your page, please logout and log back in to see the new MyBanner list.

Keystrokes in Banner 9

Action	Banner 9 Keystroke	Banner 8 Keystroke
Cancel Page, Close Current Page, or Cancel Search/Query	Ctrl + Q	Ctrl + Q
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
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

Action	Banner 9 Keystroke	Banner 8 Keystroke
Select on a Called Page	Alt + S	Shift + F3
Toggle Multi/ Single Records View	Ctrl + G	
Up/Previous Record	Up Arrow	Up Arrow

Application Navigator	
App Nav - Access Help	Ctrl + M
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