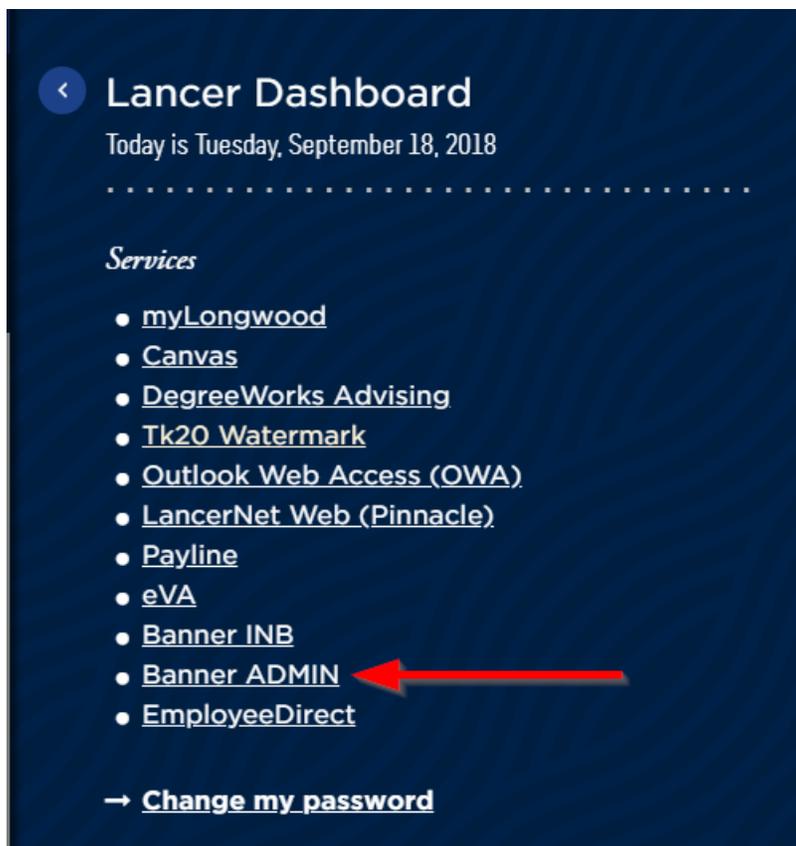




## BANNER 9 QUICK NAVIGATION GUIDE

### Banner ADMIN

Banner ADMIN is the new Banner INB. You will access the Banner ADMIN through the Application Navigator. The link to Banner ADMIN is available on the Lancer Dashboard via [Solomon.longwood.edu](http://Solomon.longwood.edu).





# BANNER 9

## QUICK NAVIGATION GUIDE

### Basic Navigation

The basic navigation of each page includes the page header, notification center, key block, sections, and buttons.

The screenshot displays the Banner 9 software interface for the 'General Person Identification SPAIDEN 9.3.6 (bnr9test)' page. The page header shows the Longwood University logo, the user name 'Mrs Aneicia Gilbert Stimpson', and a 'Sign Out' button. The main content area is divided into sections: 'IDENTIFICATION', 'PERSON', 'NON-PERSON', and 'ID AND NAME SOURCE'. The 'PERSON' section contains fields for 'Last Name' (Testing), 'First Name' (Banner), 'Middle Name' (Nino), 'Prefix', 'Suffix', 'Preferred First Name', and 'Full Legal Name'. The bottom of the page shows the 'Activity Date' (10/12/2017 09:22:36 AM), 'Activity User' (STIMPSONAG), and a 'SAVE' button.

### Page Header

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

- Page close icon
- Page title.
- Add and Retrieve icons, which are used with Banner Document Management.
- Related Menu, which displays a list of pages that can be accessed from this page (Options Menu in Banner 8).
- Tools Menu, which includes refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.
- Notification Center.

The Notification Center is located to the right of the Tools menu and displays the following types of 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

# BANNER 9

## QUICK NAVIGATION GUIDE

---

Center.

### Key Block

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.

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**.

The screenshot shows the top navigation bar of the Banner 9 system. The title bar reads "Employee Jobs NBAJOBS 9.3.4 (bnr9test)". On the right side of the navigation bar are buttons for "ADD", "RETRIEVE", "RELATED", and "TOOLS". Below the navigation bar is a search form with the following fields: "ID:" with a dropdown menu showing "Banner Nine Testing"; "Position:" with a dropdown menu; "Suffix:" with a text input field containing "00"; and "Query Date:" with a date input field showing "10/12/2017". There is also a "Last Paid Date:" label. A green "Go" button is located to the right of the search fields. Below the search form is a grey instruction bar that says "Get Started: Fill out the fields above and press Go."

# BANNER 9

## QUICK NAVIGATION GUIDE

---

### Sections

Pages are divided into sections that 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 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.

### 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.

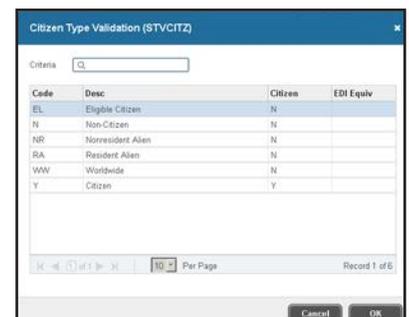
### Dates

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].

### Lookup

The Lookup feature allows you to quickly look up 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. Select a value and click **OK**, or double-click a value to return the value to the calling page.



# BANNER 9

## QUICK NAVIGATION GUIDE

---

### Buttons

Banner transformation includes several buttons.

Button	Description
Add and Retrieve	Use the Add and Retrieve buttons to interact with Banner Document Management (xTender) 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.

# BANNER 9

## QUICK NAVIGATION GUIDE

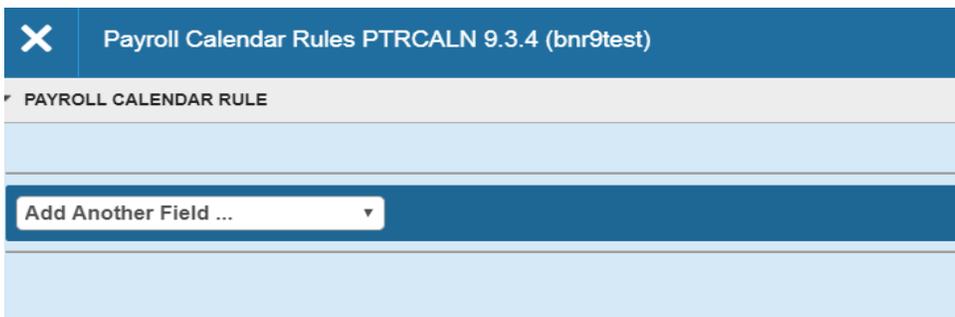
---

### 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.

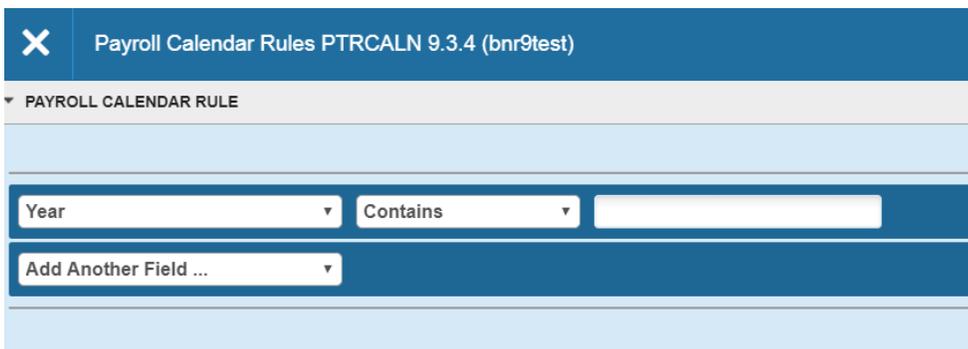
#### Procedure

1. Click the active **Filter (F7)** icon for the section.



The screenshot shows the top of a section titled "Payroll Calendar Rules PTRCALN 9.3.4 (bnr9test)". On the left side of the header, there is a blue square containing a white "X" icon, which is the active filter icon. Below the header, the section title "PAYROLL CALENDAR RULE" is visible. A blue bar with a white dropdown arrow contains the text "Add Another Field ...".

2. Choose the field you want to filter from the **Add another Field** drop-down list.



The screenshot shows the same section header as the previous image. The "Add Another Field ..." dropdown is now expanded, showing a filter rule. The rule consists of three parts: a field name dropdown set to "Year", an operator dropdown set to "Contains", and an empty text input field. Below this rule, the "Add Another Field ..." dropdown is still visible.

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.

# BANNER 9

## QUICK NAVIGATION GUIDE

---

4. Enter a value for the fields that you selected.

The screenshot shows a filter window titled "Payroll Calendar Rules PTRCALN 9.3.4 (bnr9test)". Below the title bar, the text "PAYROLL CALENDAR RULE" is visible. The filter criteria are: "Year" (dropdown) "Contains" (operator dropdown) "2017" (text input); "Payroll ID" (dropdown) "Equals" (operator dropdown) "PB" (text input); and "Add Another Field ..." (dropdown).

5. **Optional:** If you want to add another field to the filter criteria, choose a field from the **Add Another Field** field, 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 right corner of the filter window to close the filter.

# BANNER 9

## QUICK NAVIGATION GUIDE

### Help

Application Navigator provides online help for pages.

Click on the question mark in the Application Navigator header to open the help for the page in context. You can perform various actions in the help suite. For example, you can search topics or print the information. Help is also translated into Spanish. If you set your browser locale language to be Spanish and open the help file, it will be presented to you in Spanish.

### 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 two different ways:

- **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 screenshot displays the Banner 9 application interface. At the top, there is a blue header bar with the text "General Person Identification SPAIDEN 9.3.6 (bnr9test)" and navigation icons for ADD, RETRIEVE, RELATED, and TOOLS. Below the header, the ID "L00406297 Testing, Banner N" is visible. The main content area is titled "ADDRESS INFORMATION" and contains various fields for address and telephone data. The fields are organized into two columns. The left column includes: From Date (10/12/2017), To Date, Address Type (MA - Permanent Mailing Address), Sequence Number (1), Street Line 1 (201 High Street), Street Line 2, Street Line 3, City (Farmville), State or Province (VA - Virginia), and ZIP or Postal Code (23901). The right column includes: County (0147 - Prince Edward County), Nation, Telephone Type (MA - Permanent Mailing Telephone), Area Code, Phone Number, Extension, Inactivate Address checkbox, Source, Delivery Point, Connection Digit, and Carrier Route. At the bottom of the form, there are pagination controls showing "1 of 2" and a "Page" dropdown menu. The text "Record 1 of 2" is visible in the bottom right corner.

# BANNER 9

## QUICK NAVIGATION GUIDE

- 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 (first, last, next, previous, or specific page number), decide how many records you want to review in the grid, and sort the data in ascending or descending order.

Employee Class Query PTQECLS 9.3.3 (bnr9test)							ADD	RETRIEVE	RELATED	TOOLS
Code	Description	Pay ID	Salary Encumbrance Calculation Indicator	Roster	Salary	EEO Contract Group Code				
WT	Wage Temporary	PT	A	O	H	4				
WR	Wage Restricted	PT	A	O	H	4				
WF	Wage Funded	PT	A	O	H	4				
VL	Volunteers	NE	A	O	H	6				
VF	Visiting Faculty unpaid	NE	A	O	H	6				
UN	UNICCO Employees	NE	A	O	H	5				
TV	Thermal Ventures Employees	NE	A	O	H	6				
TG	Talented and Gifted Teachers	MS	H	O	H	6				
TS	Supervising Teacher	MS	A	O	H	6				
SN	Student Non-Work Study	MN	A	O	H	6				
SL	Student Longwood Work Study	MN	H	O	H	6				
SF	Student Federal Work Study	MN	A	O	H	6				
SC	Student Community Service FWS	MN	A	O	H	6				
RO	ROTC Employees	NE	A	O	H	6				
PH	Potomac Healthcare Solutions	NE	A	O	H	6				
NL	Non-Longwood Employee	NE	A	O	H	5				
NE	Non-Employee Supervisor	MS	A	O	H	6				
MS	Miscellaneous Employees	MS	A	O	H	6				
IS	International Scholar	NE	A	O	H	6				
IN	Intern	NE	A	O	H	6				

1 of 2 | 20 Per Page | Record 1 of 37

# BANNER 9

## QUICK NAVIGATION GUIDE

---

### Advanced Features

There are several advanced features that are now available to you with the Banner Transformation from Ellucian.

### Supplemental Data Engine

The Supplemental Data Engine (SDE) allows you to store data that is not part of the Banner data model. The data is displayed in the **More Information** window.

If supplemental data exists for a section of a page, the **More Information** button is displayed in the section header. The **More Information** window is where information can be viewed, edited, or added. When information is added or changed, you are prompted to save the changes. You can continue to work on the primary page.

* = Required	Comment
COV Fund	
COV Project	

10 Per Page Record 1 of 2

Enter the COV Fund

### Data Masking

Data masking is used to partially or completely obscure data in selected fields. Data masking is defined using the existing Banner General Oracle forms, and works in the same manner as the Oracle forms.

### Data Export

You can export data from a transformed Banner page to an Excel spreadsheet (.xls) by clicking **Tools > Export**.

# BANNER 9

## QUICK NAVIGATION GUIDE

---

### Item Properties

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

Item properties include the field's internal database name, whether it 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**.

### Keyboard Shortcuts

You can customize key mappings at your institution. Oracle forms function keys such as Commit, List, Duplicate Item, and Edit are not used in Banner Transformation.

Function	Key Stroke
Next field/item	Tab
Previous field/item	Shift + Tab
Up	Up arrow
Down	Down arrow
Previous page up	Page up
Next page down	Page down
Function	Key Stroke
First page	Ctrl + Home
Last page	Ctrl + End
Page tab 1, page tab 2	Ctrl + Shift + 1, Ctrl + Shift + 2
Edit	Ctrl + E
Choose/Submit/Action	Return/Enter
List of values	F9

## BANNER 9 QUICK NAVIGATION GUIDE

---

Cancel form, Exit, Close current page, Cancel search or query	Ctrl + Q
Save	F10
Clear One Record	Shift + F4
Delete Record	Shift + F6
Duplicate Selected Record	F4
Insert/Create Record	F6
Clear All in Section	Shift + F5
Open Menu Directly	Ctrl + M
Next Section	Alt + Page down
Previous Section	Alt + Page up
Duplicate Item	F3
Clear Page/Start over	F5
Search/Open Filter Query	F7
Execute Filter Query	F8
Export	Shift + F1
Function	Key Stroke
Print	Ctrl + P
Refresh/Rollback	F5
Open Related Menu	Alt + Shift + R
Open Tools Menu	Alt + Shift + T
More Information	Ctrl + Shift + U
Application Navigator Display Open Items	Ctrl + Y

## BANNER 9 QUICK NAVIGATION GUIDE

---

Application Navigator Search	Ctrl + Shift + Y
Application Navigator Help	Ctrl + Shift + L
Application Navigator Sign Out	Ctrl + Shift + F
Copy	Ctrl + C
Cut	Ctrl + X
Paste	Ctrl + V
Undo	Ctrl + Z
Redo	Ctrl + Shift + Z
Cancel action	Esc
Select on a Called Form	Alt + S
Retrieve BDM Documents	Alt + R
Add BDM Documents	Alt + A
Submit Work flow	Alt + W
Release Work flow	Alt + Q