

Banner 9

Navigation Guide 081418

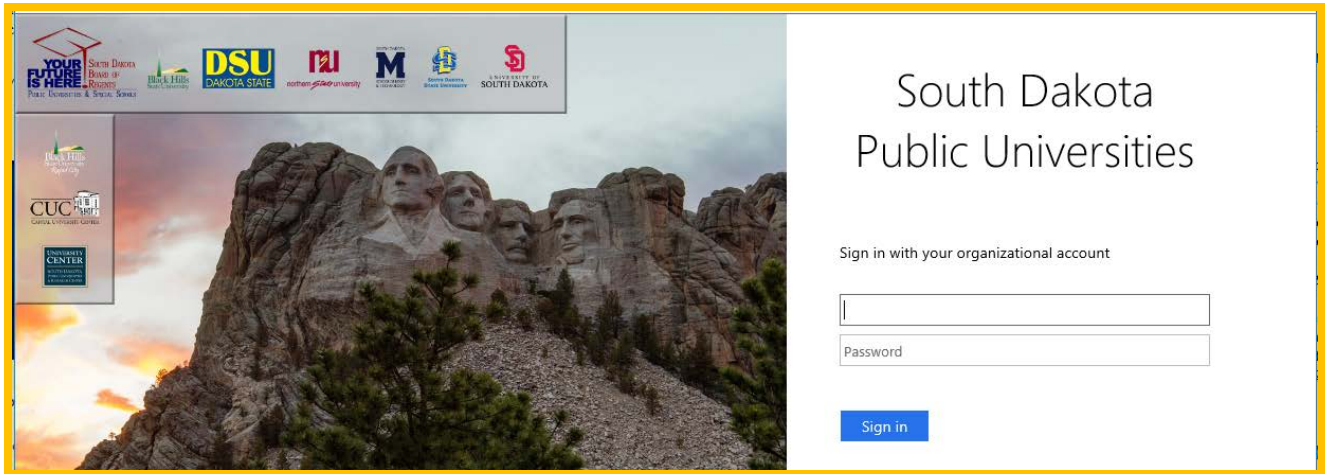


Contents

Application Navigator	3
Appendix	
Buttons.....	18
Banner Keyboard Shortcuts.....	19

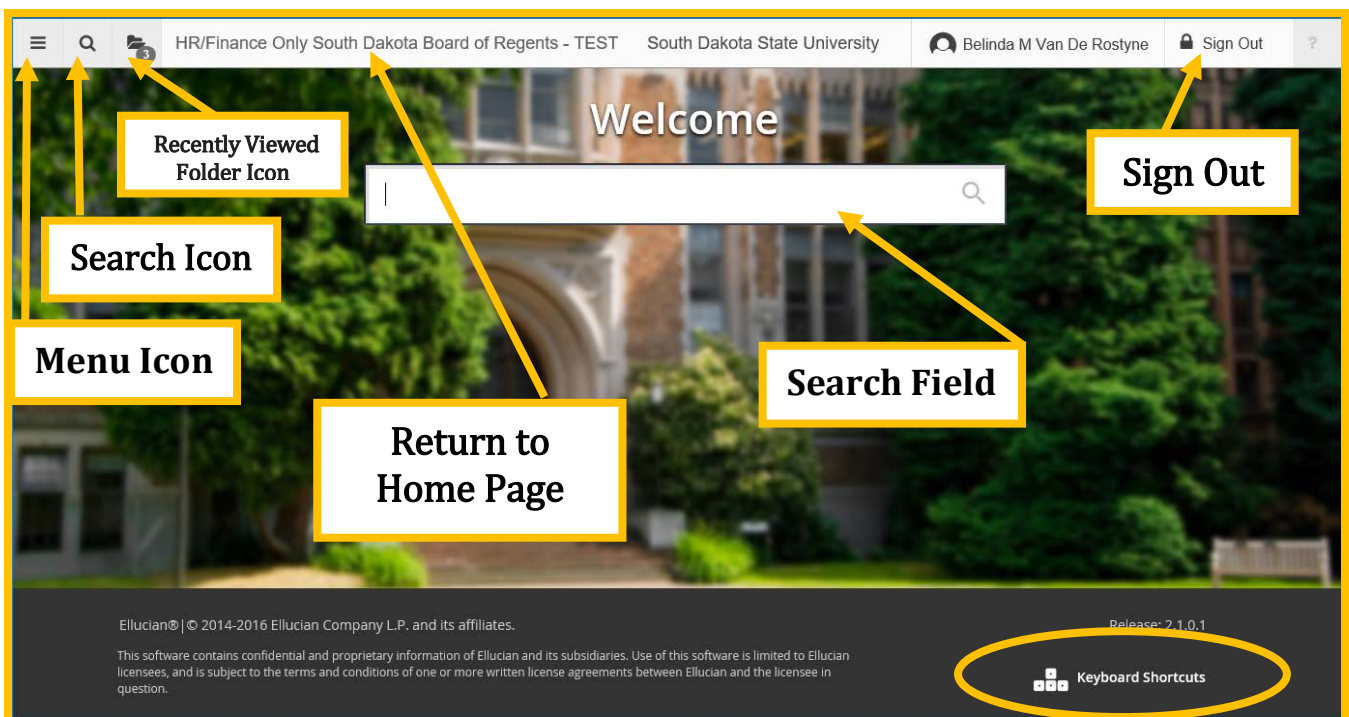
Log In

Use your Active Directory (AD) sign on through SNAP to access Banner 9. This is your email address and the password you use to log in to your computer.



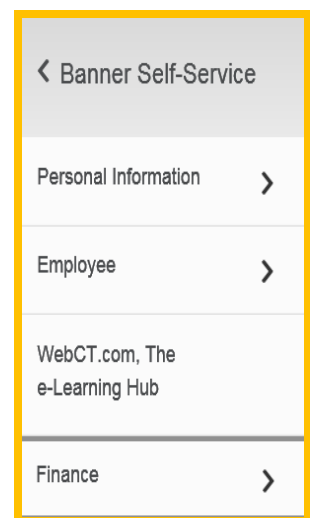
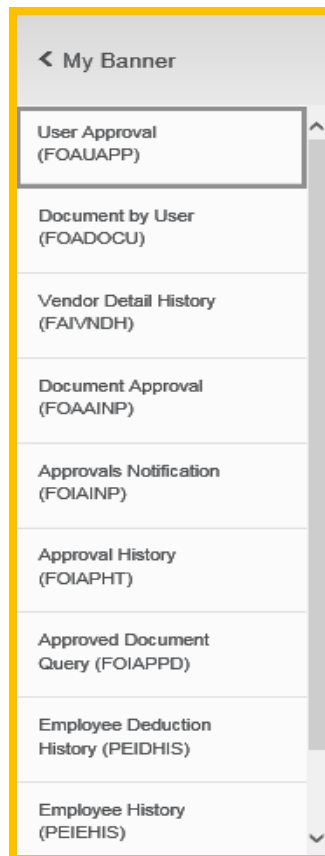
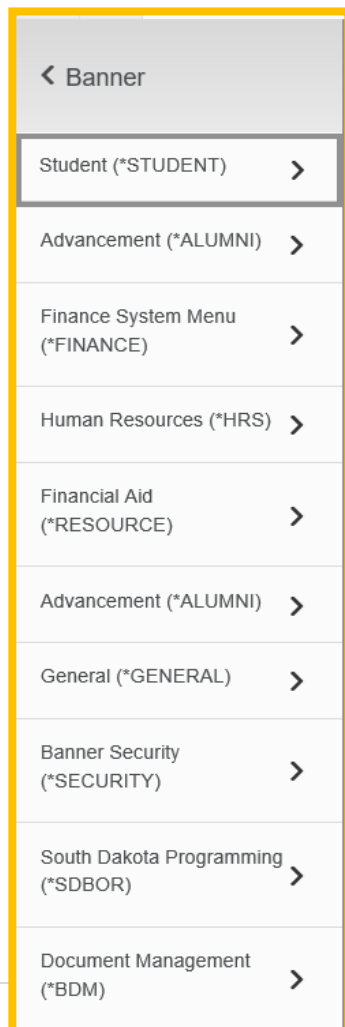
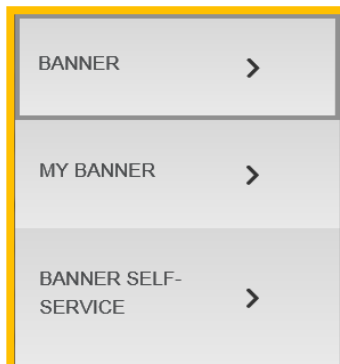
Banner 9


Navigate to Banner 9 from the Banner INB link in SNAP. This is a screenshot of the landing page. Note that what is called a "Form" in Banner 8, is called a "Page" in Banner 9. From here you can access Banner pages using the Menu Icon, the Search Icon or the Search Field. Return to the Home Page by clicking on the South Dakota Board of Regents link at the top of the page.

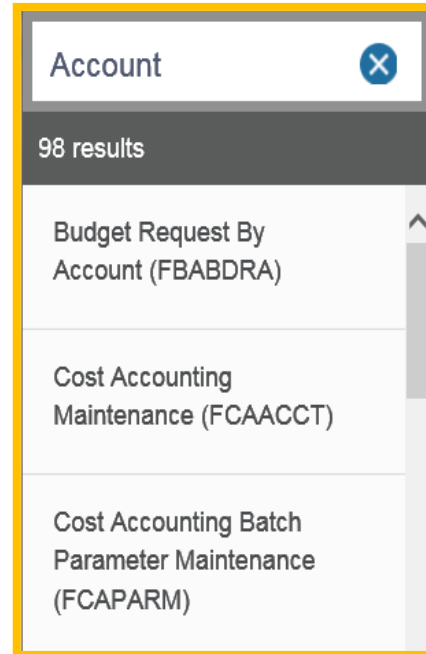
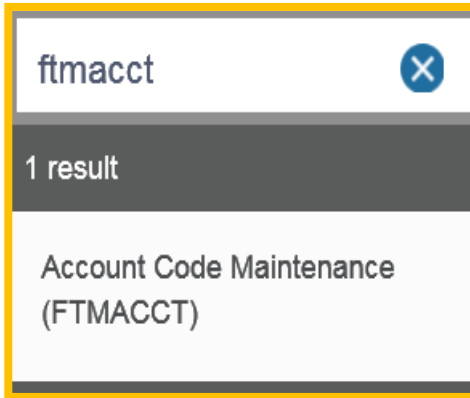


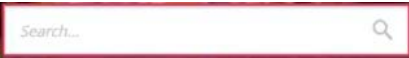

You can then use any of the following to navigate within Banner 9:

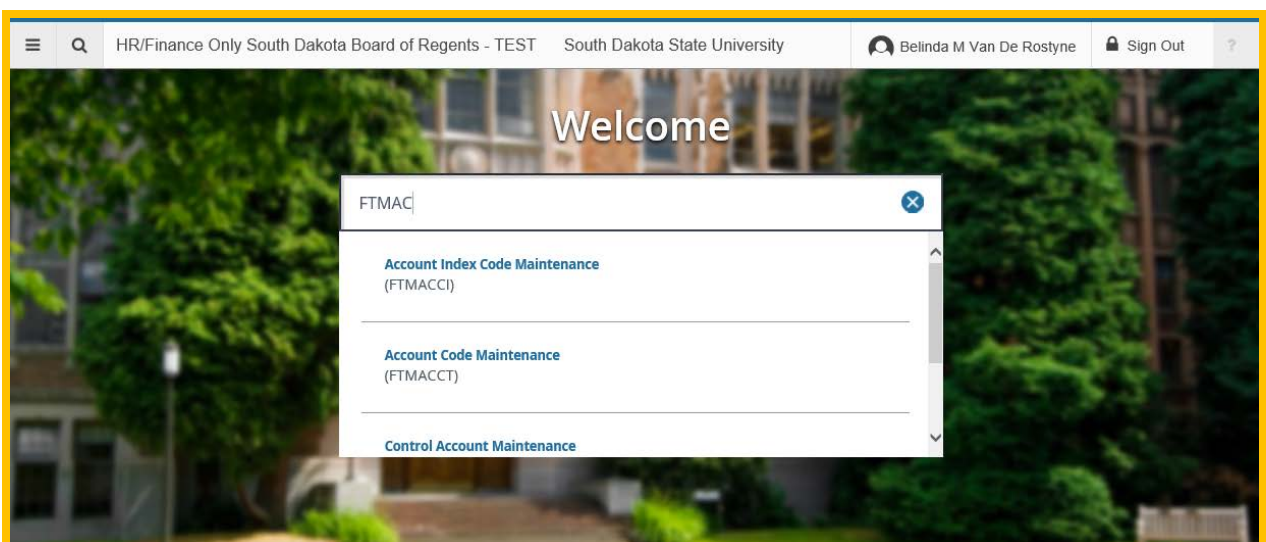
- **Menu icon** ☰ (CTRL+M) – The **Menu icon** is located in the upper left corner of the application. Click on this icon to open the BANNER, MY BANNER and BANNER SELF-SERVICE menus. Click on the right arrow > to expand the menu tree and locate a specific application. To open a page, click on the page name. The **Menu icon** will also allow you to open the My Banner menu which will allow you to create a personal list of pages that you use regularly. To collapse the menu tree at any time click the left arrow <. To close the menu panel completely, click on the **Menu icon** ☰ again or use the Ctrl+M shortcut.




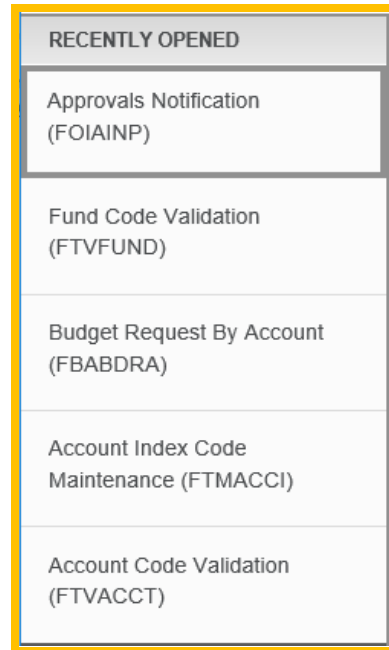
- **Search icon**  (CTRL+Shift+Y) – The **Search icon** is located in the upper left corner, to the right of the Menu icon. Click on the **Search icon** to open the search menu panel. You can enter keyword(s), page name or partial page name, or the Banner page code (7-letter acronym) for the page. Click on the page name to open it. To close the search menu panel at any time click on the **Search icon** again or use the CTRL+Shift+Y shortcut.



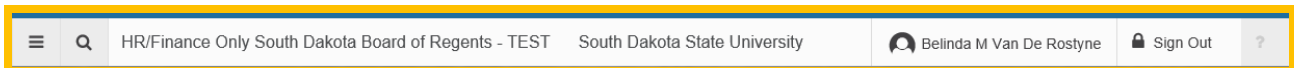
- **Search field**  (CTRL+Home) – The Search field is located in the center of the landing page. You can enter keyword(s), page name or partial page name, or the Banner page code (7-letter acronym) for the page. Use the scroll bar to review the list and locate the desired page. Click on the page name to open it. To close the search click on the close button  or use the F5 shortcut.




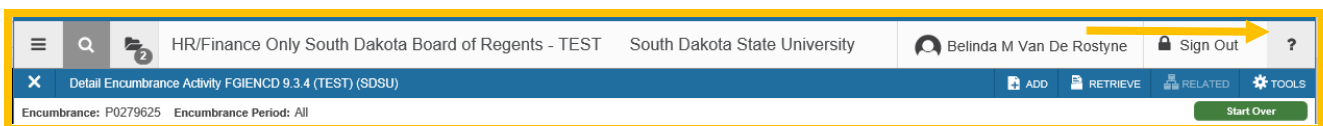
- **Recently Viewed Folder icon**  (CTRL+Y) – The **Recently Viewed Folder icon** is located in the upper left corner, just to the right of the Search icon. It is displayed with a count of pages after you have opened the first page in an application. Click the icon to view a list of those pages.



- Click on the **South Dakota Board of Regents** home link to return to the Banner 9 landing page.




- **Online Help icon**  (CTRL+Shift+L) – The **Online Help icon** is located to the right of the Sign Out link and indicates that online help is available for all pages. This function allows you more information regarding a selected page or help in using that page including step-by-step instructions. Close the browser window to exit Help.



ellucian. Banner Finance Online Help

Contents | Search

Click to print page-specific information 

Detail Encumbrance Activity (FGIENCD) page

The Detail Encumbrance Activity page provides an online filter of detailed transaction activity for an original encumbrance entry and all transaction activity against the encumbrance. This is a filter-only page.

Fields applicable to multi-year encumbering are described in the following chart:

Fields	Descriptions
Encumbrance Period	Value that determines which encumbrance amounts are displayed. This field is enabled only for labor encumbrance documents, which have encumbrance numbers preceded by the letters PR. Use this pull-down field to view specific records for the selected encumbrance number. <ul style="list-style-type: none"> • Multiple Year = Displays all current and future item numbers 0-5 for records that have the Encumber Multi Year Labor indicator checked on the FRMFUND record with an effective date that is less than or equal to the system date. • Current Year = Displays only encumbrance amounts for current item numbers 0-2. • Future Year = Displays only encumbrance amounts for future item numbers 3-5. • All = Displays all records for the encumbrance document number defined in the key block. Default.
Item	Kind of encumbrance amount that is associated with an encumbrance sequence, such as Current Salary, Current Fringe, and so on. <p>Item numbers for current active fiscal year encumbrance amounts:</p> <ul style="list-style-type: none"> • 0 = Current salary • 1 = Current fringe • 2 = Current residual <p>Item numbers for future multi-year encumbrance amounts:</p>

List of all pages in the Banner Module

- Banner Finance Online Help, January 2016
- Reporting (FAA1099) page
 - Batch Check Print (FAABATC) page
 - Bank Tape Reconciliation (FAABREC) page
- Check Cancellation (FAACHKS) page
- Invoice/Credit Memo Cancel (FAAINVD) page
- Invoice/Credit Memo (FAAINVE) page
- Purchase Card Transaction Maintenance (FAAINVT) page
 - Online Check Print (FAAONLC) page
 - Recurring Payables (FAARUIV) page
- Vendor Invoice Consolidation (FACICON) page
- Purchase Card Filter (FAICARD) page
 - Check Payment History (FAICHKH) page
- Invoice/Credit Memo Filter (FAINVE) page
- Invoice/Credit Memo List (FAINVL) page
- Receiving/Matching Status Filter (FAIIREC) page
- Open Invoices by FOAPAL (FAOINF) page

- **Keyboard Shortcuts** – The Banner 9 landing page has a set of keyboard shortcuts, which you can review by clicking on **Keyboard Shortcuts** in the bottom right corner of the page. Please see the Appendix for a full list of Keyboard Shortcuts. Click on the **Keyboard Shortcuts** link again to close the list.

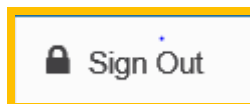


Keyboard Shortcuts for general functionality are located at the bottom of the Welcome Page







CTRL +M	Display the menu
CTRL+Y	Display the recently visited screens
CTRL+SHIFT+Y	Search
CTRL+SHIFT+L	Help
CTRL+SHIFT+F	Sign Out

Sign Out

It is important to remember to use the **Sign Out** link (Ctrl+Shift+F) in the upper right corner when closing the application (instead of just closing your browser) to make sure you are logged out of the application.

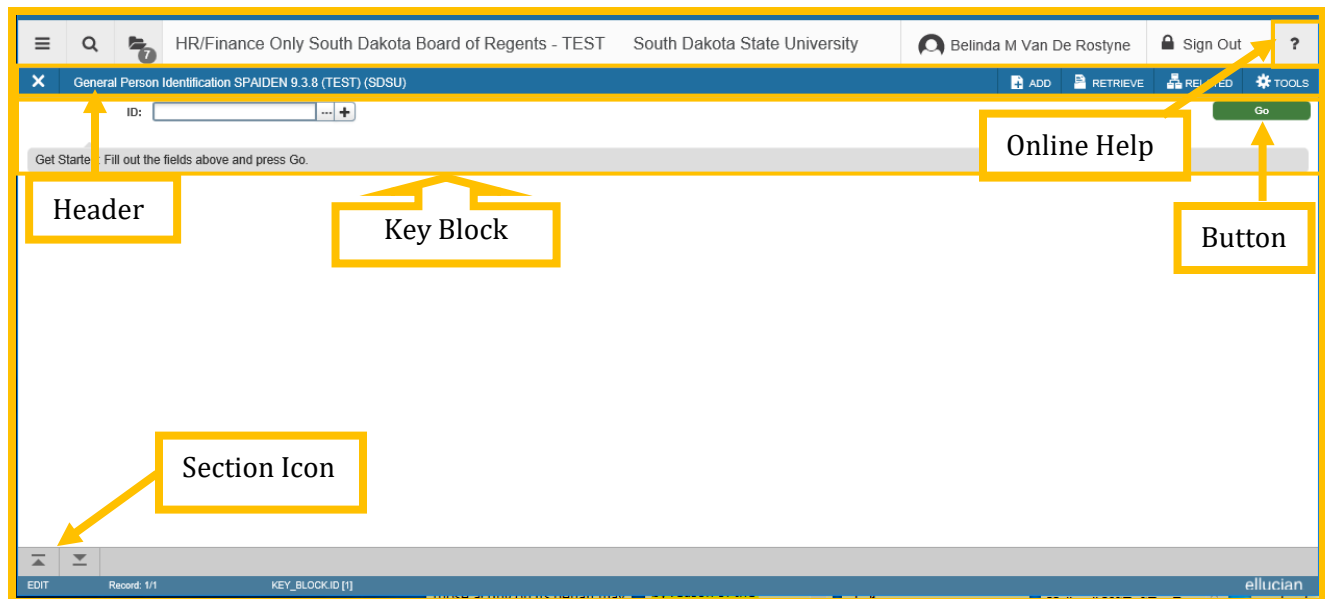


Change in “Banner Language”

Banner 8	Banner 9
Query	Filter 
Record Insert/Record Duplicate	Copy/Insert  
Date Format: DD-month-YY	MM/DD/YYYY
Roll Back	Start Over 
Next Block	Next Section (Icon) 
Previous Block	Previous Section (Icon) 
Screen/Form	Page

Basic Navigation

The basic navigation of each page (previously Forms) includes the page header, key block, sections, notification center, buttons and section icons.



Page Header



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

- **Page close icon “X”** – Always use this icon to close your page.
- **Page title** – Includes description, acronym, version, and database.
- **Add and Retrieve icons** – These icons are used with Banner Document Management (Xtender).
- **Release and Submit icons** – Displayed only with a workflow.
- **Related icon** – Displays a list of pages that can be accessed from this page or use the Search field to locate a specific page
- **Tools icon** – Will include refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page. (formerly Options in Banner 8)


Key Block

Only the **Key Block** displays initially. The fields, icons, etc. within the key block are the same as in Banner 8. 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 **Lookup icon**  next to a field allows you to quickly find a value for a field.

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.

Populate the key block data and then click **Go** (previously Next Block) to access the body of the page. Note that the key block collapses, but the information is still viewable.

You can return to the key block if you are in the body of a page by clicking the **Start Over** button  (previously Rollback).

Sections

The screenshot displays a web application interface for 'HR/Finance Only South Dakota Board of Regents - TEST' at 'South Dakota State University'. The user is 'Belinda M Van De Rostyne'. The main section is 'Detail Encumbrance Activity FGIENCD 9.3.4 (TEST) (SDSU)'. It features a top navigation bar with 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons, and a 'Start Over' button. The 'ENCUMBRANCE INFORMATION' section is expanded, showing details for 'Tousimis Research Corp Inc' with a balance of 19,228.51. Below it, the 'ENCUMBRANCE DETAIL' section is also expanded, showing a table of items with columns for Item, Sequence, Fiscal Year, Status, Commit Indicator, COA, Index, Fund, Orgn, Acct, Prog, Locn, Proj, Encumbrance, Liquidation, and Balance. The 'TRANSACTION ACTIVITY' section is also expanded, showing a table with columns for Transaction Date, Type, Document Code, Action, Transaction Amount, and Remaining Balance. A callout box with a yellow border and black text points to the gray bars in the section headers, stating 'Sections are denoted by gray bars.'

Pages are divided into sections (previously blocks) 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 expanded 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.

Use the scroll bar on the right to move up and down on the page. Note that there may be horizontal scroll bars just as in Banner 8.


Functions within Sections

The screenshot shows the 'General Person Identification SPAIDEN 9.3 (SMPL)' interface. The user ID is 'N00025649' and the name is 'Baldwin, Jessie S.'. There is a 'Start Over' button in the top right. Below the header, there are tabs for 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', 'Emergency Contact', and 'Additional Identification'. The 'IDENTIFICATION' section is expanded, showing a table with columns for 'ID' and 'Name Type'. A callout box with a yellow border and black text highlights the 'Insert', 'Delete', 'Copy', 'More Information', and 'Filter' buttons in the table header.

You can perform specific functions such as Insert, Delete, Copy and Filter within each section. Your cursor must be in that section to activate these functions otherwise they will be grayed out and not activated.

- **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** – *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.

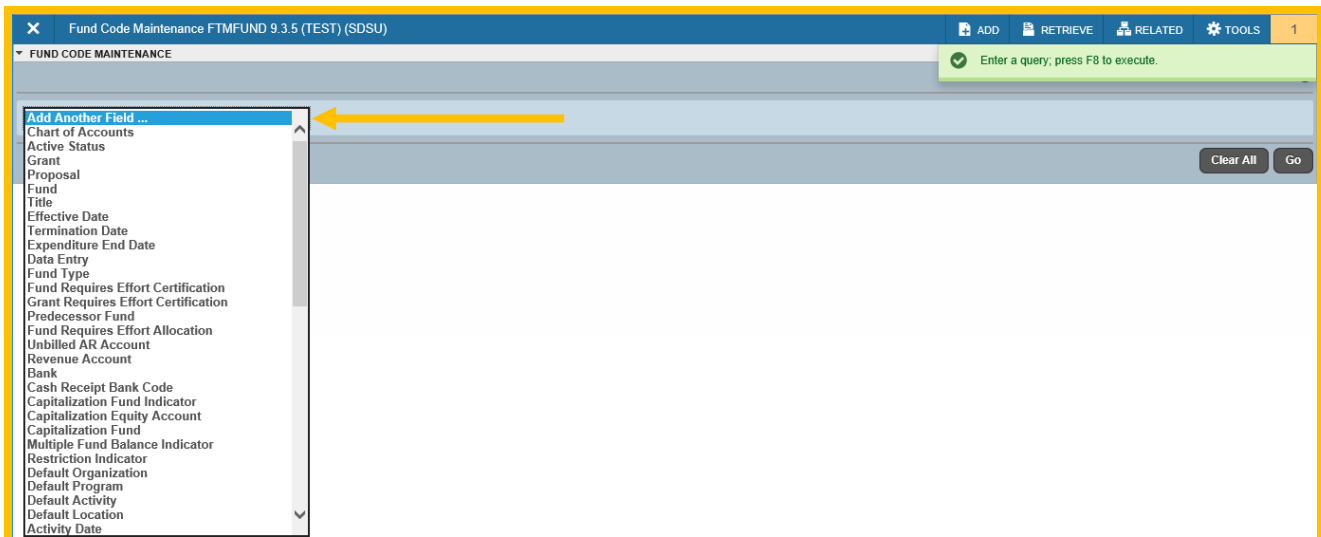
Filtering Data


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.

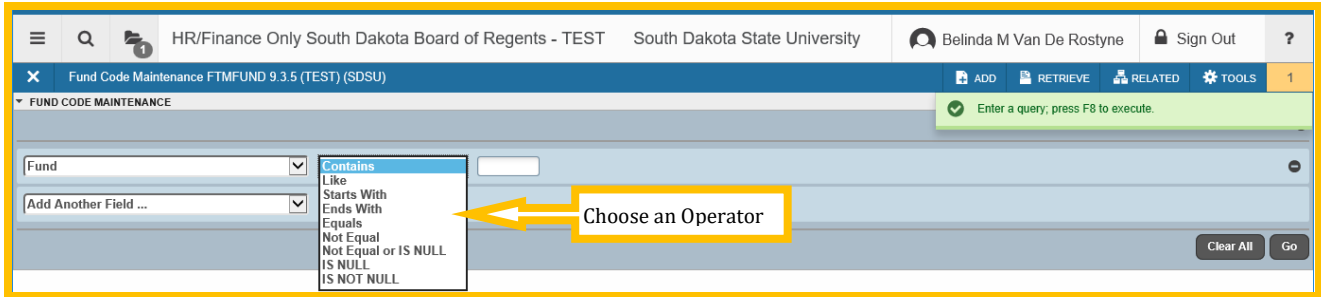
1. Enter S for Chart of Accounts, then click the active **Filter** (F7) icon for the section.




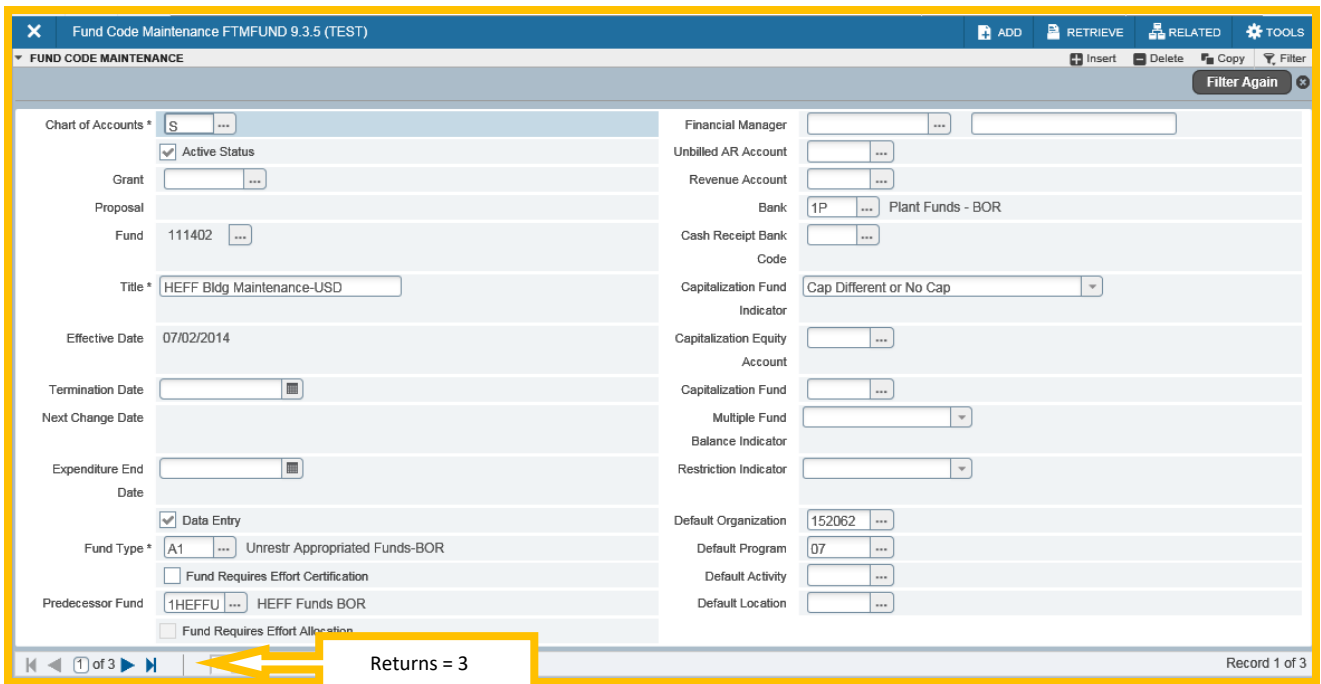
2. Choose the field you want to filter from the **Add Another Field** drop down list. For our example, we will select **Fund** from the Add Another Field drop down list.



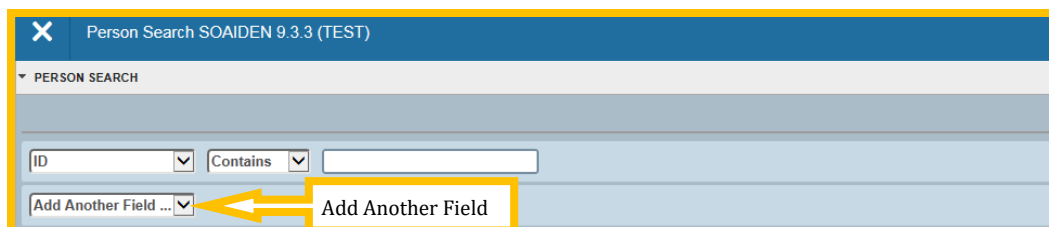
- Choose an operator from the **Contains** drop down list. The available operators depends on the type of field (numeric, alphanumeric, date, check box, or other) from your first filter selection. For our example, we will select the operator **"Equals"** to go with our "Fund" field selection. In this example, we must enter a **fund value** in the blank field to the right of Equals.
- Then click on the **Go button**  below.



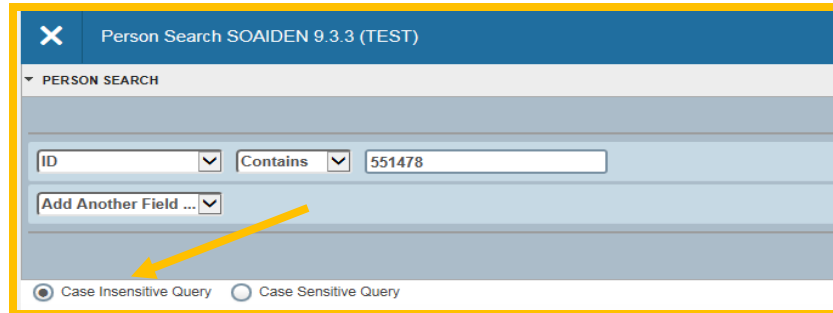
This screenshot depicts the results of our filters [Fund] + [Equals]+ [111402]. Note the # of returns – the most current one appears first. Click on the right arrow  to access #2 and #3.



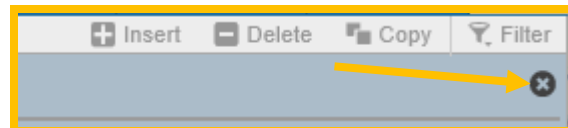
The **Contains** operator is available for alphanumeric and other fields only. The **Between** operator includes the values entered. For example, for codes "between" 1 and 5, the values 1, 2, 3, 4, and 5 are considered. Required fields do not use the Is Null and Is Not Null operators.



5. Enter a value for the field you selected. Note: If you want to enter a case sensitive query for your search, in the **Case Sensitive** Filter radio group, select Yes, and then enter your query.



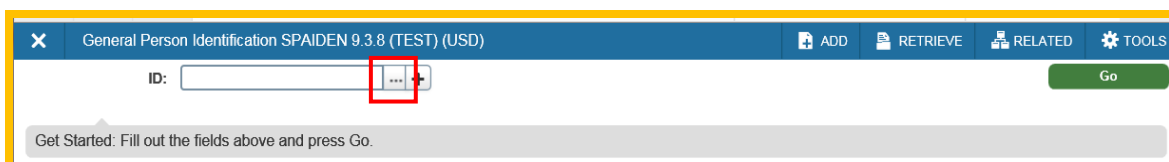
6. **Optional:** If you want to add another field to the filter criteria, choose a field from the **Add Another Field** dropdown, select an operator, and enter a value for the field that you selected. Repeat this step until all filter criteria are entered.
7. When all filter criteria are entered, click **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.
8. **Optional:** If you want to perform another filter, click the **Filter Again** button.
9. **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.



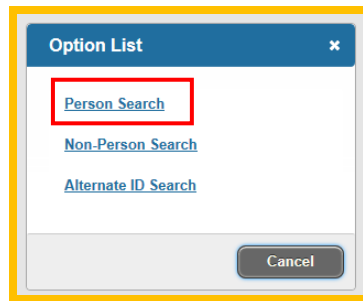
Wildcard Lookup

When utilizing the Wildcard 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 person with an incomplete ID number you may enter the known information as A0055%47%.

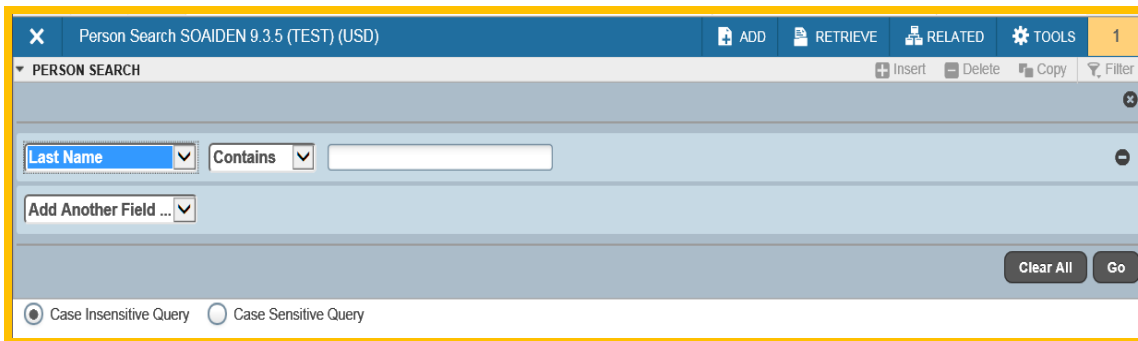
1. Select the **Lookup icon**



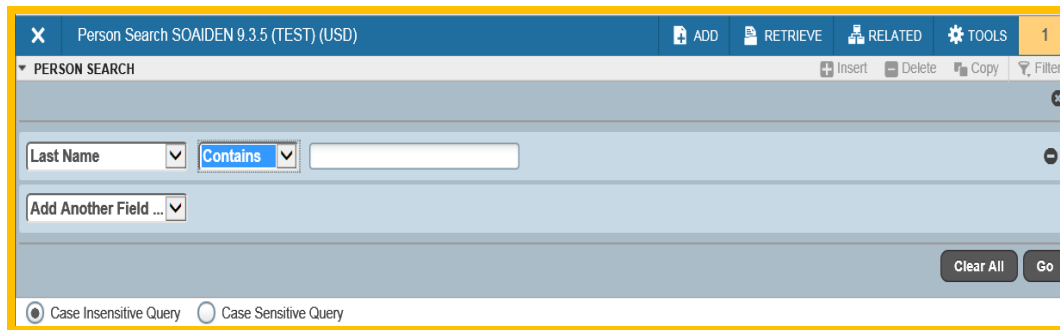
2. Choose the type of search to be completed from the option list.



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. Select **Go** button.
6. You will be provided 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.

Person Search SOAIDEN 9.3.5 (TEST) (USD)

PERSON SEARCH

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix
522253	Fernandez-Garrido	Miguel		04/29/75	ID Change	
A00004556	Fernandez-Garrido	Miguel		04/29/75		
H03002551	Fernandez-Garrido	Miguel		04/29/75	ID Change	
7391329	Garrard	Maya	Noelle	01/12/98	ID Change	
A00205295	Garrard	Maya	Noelle	01/12/98		
A00001178	Garrels	Mary	V	04/03/76	Name Change	
1320720	Garrels	Mary	Vernelle	04/03/76	ID Change	
A00001178	Garrels	Mary	Vernelle	04/03/76		
A00071468	Garrett	Marvin				
1007868	Garrett	Mary	Ellen Vogel	06/15/54	ID Change	

Record: 1/39 SPRIDEN SPRIDEN_ID [1]

7. The selected information will be returned to the calling page. Select the **Go** button.

General Person Identification SPAIDEN 9.3.8 (TEST) (USD)

ID: **Go**

Garrett, Mary Ellen

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

General Person Identification SPAIDEN 9.3.8 (TEST) (USD)

ID: A00004610 Garrett, Mary Ellen **Start Over**

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

IDENTIFICATION

ID: Name Type:

PERSON

Last Name: Prefix:

First Name: Suffix:

Middle Name: Preferred First Name:

Full Legal Name:

NON-PERSON

Name:

ID AND NAME SOURCE

Last Update

Activity Date: 06/12/2006 04:55:21 PM Activity User: FRSCVT

Record: 1/1 SPRIDEN_CURRENT.SPRIDEN_ID [1] **SAVE**

Bottom Section 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 backwards in the sections (Alt+Page Up)
- **Next Section** button – Will take you to the next section of the page (Alt+Page Down)
- **Activity Date** – Current system time. This would be the time stamped for the record if created or modified.
- **Save** – This is the button you will use to save your data.

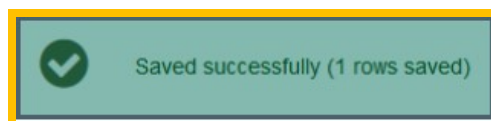
Notification Center Messages



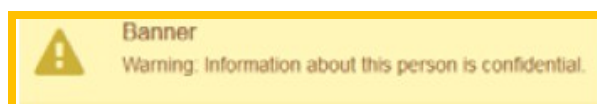
- **Notification Center** (formerly Auto-Hint Line) - Will be located to the right of the Tools Icon in the page header and will only display when there are 1 or more “alerts” as indicated by the number. Toggling on the number shows or hides the message. There are four alert levels: Green, Yellow, Red and Info Notifications. You can click in the box with the number in the page header to open or close the Notification Center.

You may see four message notification component types when working in Banner 9:

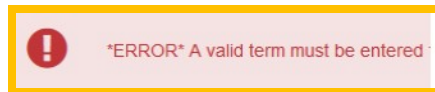
- ✓ **Success Notification** – Will display a checkmark in a circle when message is displayed.



- ✓ **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 “!” in a circle when message is displayed



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



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).

Lookup

The Lookup feature allows you to quickly find a value for a field. The **Lookup icon**  next to a field indicates that the field has the Lookup feature.







Click the **Lookup icon** , enter a filter value, and press **Enter** or the **Go**  button to display results that match the filter criteria. 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.

Appendix

Buttons

Banner pages include 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.
Start Over 	Use the Start Over button to return to the key block of the page.
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 icon to navigate to the next section of data. Use the Previous Section icon 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.

Banner Keyboard Shortcuts

Action	Banner 9 Keystroke	Banner 8 Keystroke
Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	Ctrl + Q	Ctrl + Q
Change MEP Context	Alt + Shift + C	Not applicable
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	Not applicable
Insert/ Create Record	F6	F6
Last Page	Ctrl + End	Not applicable
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	Not applicable
Open Tools Menu	Alt + Shift + T	Not applicable
Page Tab 1 Page Tab 2 etc.	Ctrl + Shift +1 Ctrl + Shift +2 And so on	Not applicable
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
Toggle Multi/ Single Records View	Ctrl + G	Not applicable
Up/Previous Record	Up Arrow	Up Arrow

Workflow		
Release Workflow	Alt + Q	Icon or Menu
Submit Workflow	Alt + W	Icon or Menu

Action	Banner 9 Keystroke	Banner 8 Keystroke
Banner Document Management		
Add BDM Documents	Alt + A	Icon or Menu
Retrieve BDM Documents	Alt + R	Icon or Menu

Access Help	Ctrl + M	
Access Menu	Ctrl + Y	
Display Recently Opened Items	Ctrl + Shift + L	
Search	Ctrl + Shift + Y	
Sign Out	Ctrl + Shift + F	