



Banner 9 Basic Navigation

OTS Applications Team

Zoom notes before we begin

Purpose:

This training is a Banner basics review of Banner 9 and the navigation and other functionality crosses over all modules. The approach is “generic” to cover navigation and usage of Banner 9 in order to assist a wide variety of users.

Reminders

- 90+ attendees
- All muted
- Questions – please post in chat
- There will be time at the end of the session
- More sessions in the future
- Will post recorded session
- PDF contains slides

Important

If internet issues are encountered during the training, this session will be rescheduled.

Agenda - Banner 9 Basic Navigation

- Finding Banner 9 link and information/videos
- Banner Gets a New Look and Benefits
- Menu Bar
- Menu
- Search for Forms/Pages
- Next Block = GO
- RollBack = Start Over
- Options = Related or Tools
- Tools
- Record Maintenance (insert,delete,copy)
- See Data
- Error Messages
- Query = Filter
- Search for a person or vendor
- Searching
- Inactivity
- Other Resources

Finding Banner 9 and information

<http://www.tnstate.edu/banner>

tnstate.edu/banner/

Office of Technology Services
Banner Support
Forms
OTS Toolkit
Banner
Staff Info
Contact Us

Home > Banner System

Banner Support

Banner Resources & Documentation

Helpful Aids

LOG A TICKET
How to Submit a Ticket on SNOW (Service Now)

PASSWORD RESET
Can't log in? Submit a ticket on **ServiceNow** for OTS to resolve your issue. To login use your TSU email and password.
Request Your Banner (INB) Password Reset Video

NEED ACCESS TO BANNER or BDMS?
Complete these forms.


Banner Resources & Documentation

BANNER 9

Videos
Welcome to Banner 9
Banner 9 Navigation

What's New in Banner 9?
Finance
Human Resources
Student and Financial Aid

Access to Systems



PROD (Live data)
Banner 9
Banner PROD is the instance that contains 'live' data. It is real-time and where business processing, such as data entry, running jobs and other functions are performed.

DEVL, STGE & TEST
These instances are copied of Banner PROD. The data is not live, therefore, it is not current. The databases are 'cloned' from Banner PROD periodically. They are used for testing upgrades and other fixes that may need to be made to Banner before they are applied.

NOTE: If you currently have access to Banner PROD, you have access to the other instances as well (if your access was granted before the most recent clone). Your password is the same as your PROD password as long as it has not been changed in between clones. If you need your password reset, please submit a SNOW ticket.

Self-Service Banner (SSB) is the test instances of **Banner Services Tab** that you typically access through MyTSU. After signing into SSB, you will automatically be directed to the menu.

Banner 8 vs Banner 9 keys

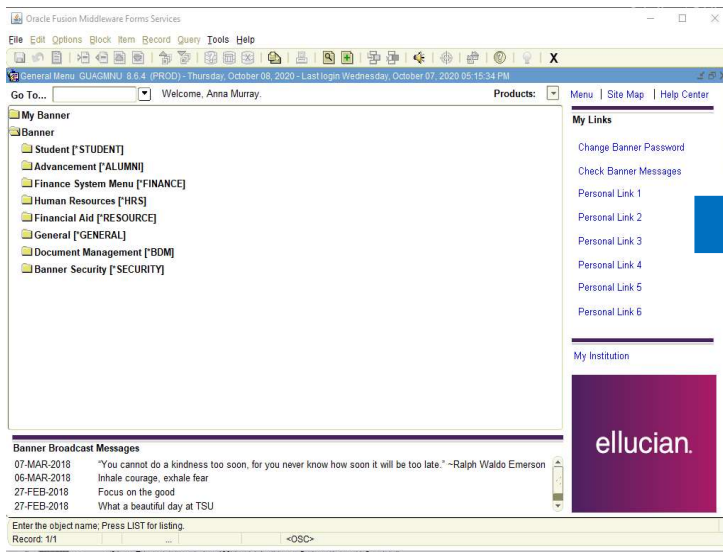
<http://www.tnstate.edu/banner/Banner%209%20Quick%20Reference%20Sheet.pdf>

- F10 still saves, F7 still starts a query, F8 still executes query, etc

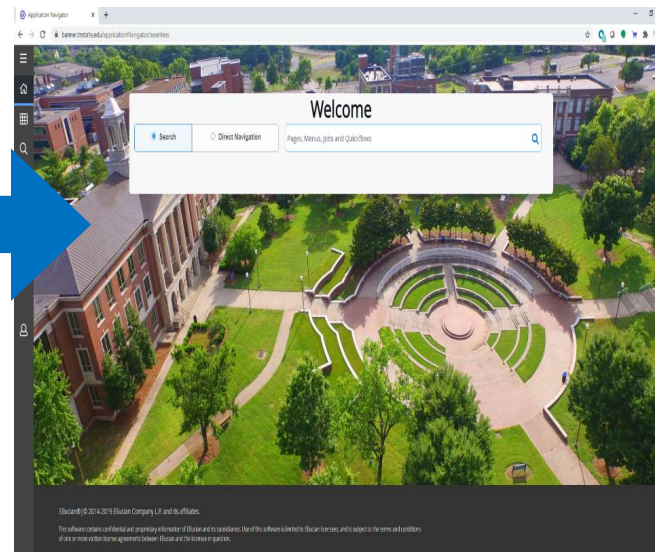
QUICK REFERENCE SHEET		
Actions with new or updated keyboard combinations in Banner 9 are indicated by bold entries.		
Action	Banner 8	Banner 9
APPLICATION NAVIGATOR		
Access Help		CTRL+M
Access Menu (My Banner Menu)		CTRL+Y
Display recently opened items		CTRL+SHIFT+L
Search		CTRL+SHIFT+Y
Sign out		CTRL+SHIFT+F
BANNER DOCUMENT MANAGEMENT (BDM)		
Add BDM Documents	Icon or Menu	ALT+A
Retrieve BDM Documents	Icon or Menu	ALT+R
Cancel Page, Close Current Page or Cancel Search/Query (in Query mode)	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	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	F8	F8
Exit	CTRL+Q	CTRL+Q
Expand/Collapse Drop-down Field	Click field	ALT+Down Arrow
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	PgDn	PgDn
Next Section (Block)	CTRL+PgDn	ALT+PgDn
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		CTRL+SHIFT+1
Page Tab 2		CTRL+SHIFT+2
and so on		and so on
Previous Field or Item	SHIFT+Tab	SHIFT+Tab
Previous Page Up	PgUp	PgUp
Previous Section (Block)	CTRL+PgUp	ALT+PgUp
Print	SHIFT+F8	CTRL+P
Refresh or Rollback	SHIFT+F7	F5
Save	F10	F10
Search or Open Filter 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

Banner Gets a New Look

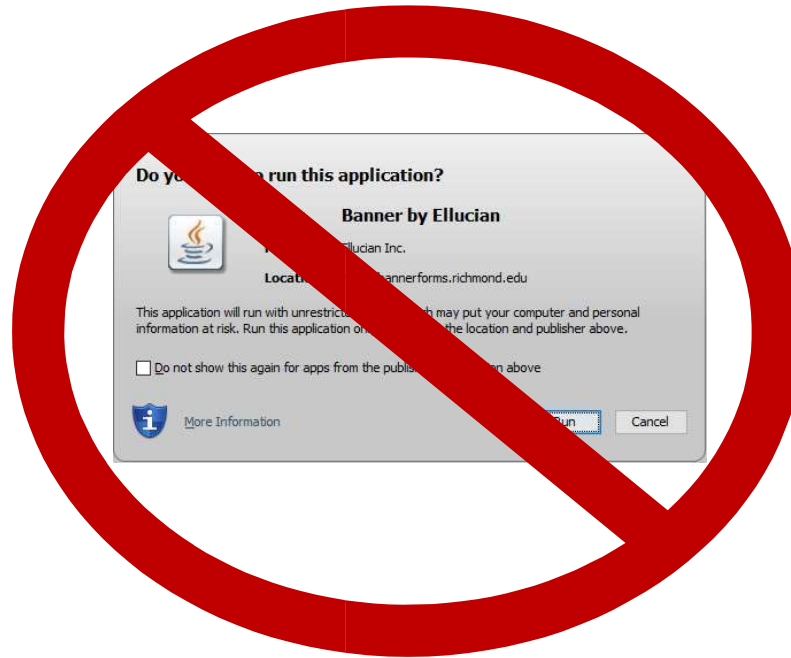
Banner 8 Menu



Banner 9 Menu



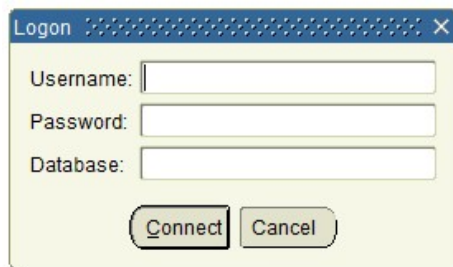
Benefit: No more Java!



Benefits: No Banner-specific password

Just log in with your regular credentials (TNState Username and password - same one that you use to log onto your computer, into Outlook and mytsu)

Banner 8 login

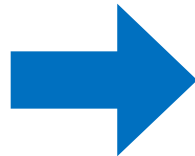
A screenshot of the Banner 8 login dialog box. It has a title bar that says "Logon" with a close button. Inside, there are three input fields: "Username:", "Password:", and "Database:". Below the fields are two buttons: "Connect" and "Cancel".

Logon [Close]

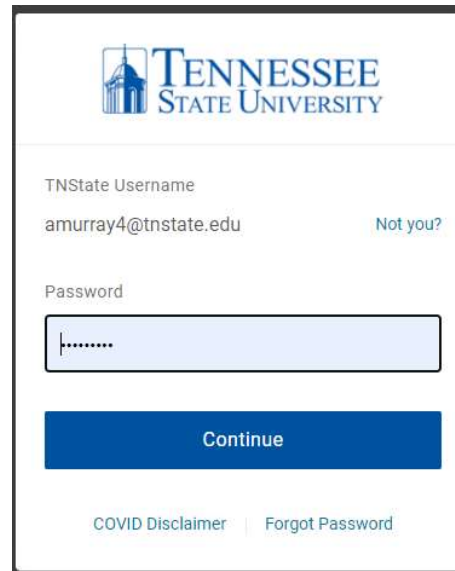
Username:


Password:

Database:



Banner 9 login

A screenshot of the Banner 9 login page. It features the Tennessee State University logo at the top. Below the logo, it says "TNState Username" followed by the email address "amurray4@tnstate.edu" and a link "Not you?". There is a "Password" label above a password input field. Below the password field is a blue "Continue" button. At the bottom, there are links for "COVID Disclaimer" and "Forgot Password".

 TENNESSEE STATE UNIVERSITY

TNState Username
amurray4@tnstate.edu [Not you?](#)

Password

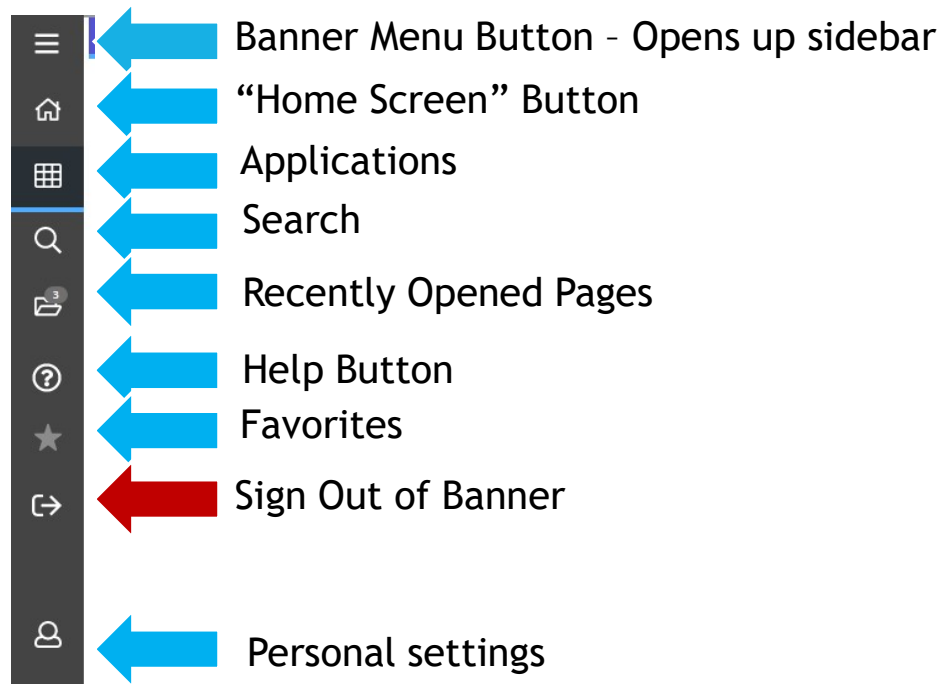
[COVID Disclaimer](#) | [Forgot Password](#)

Benefit: Any browser you like!

No longer tied to Internet Explorer!

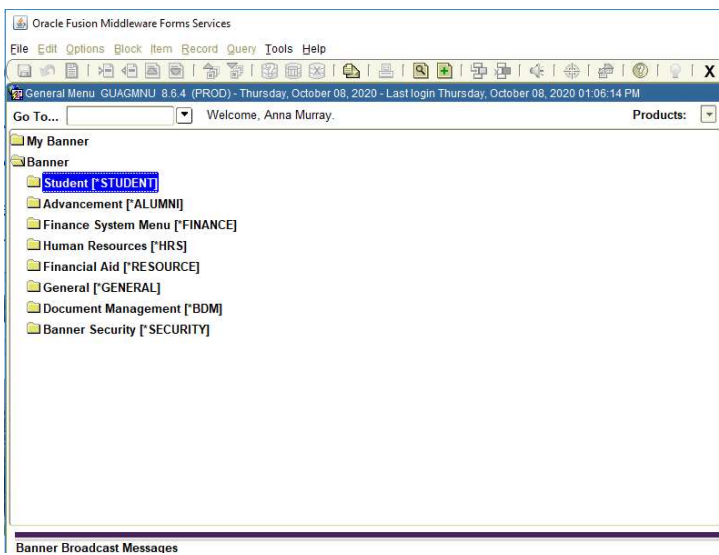


Banner 9 Menu Bar

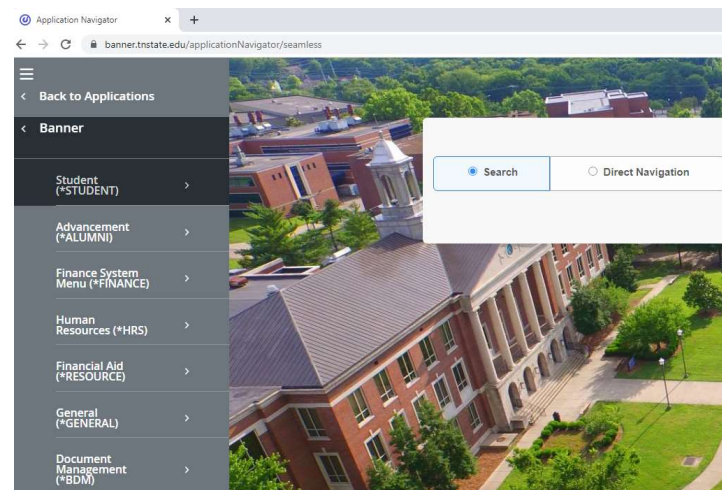


Menus

Banner 8

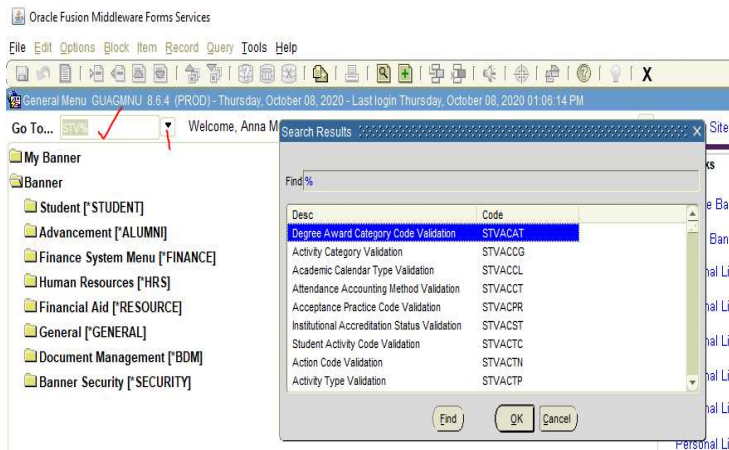


Banner 9

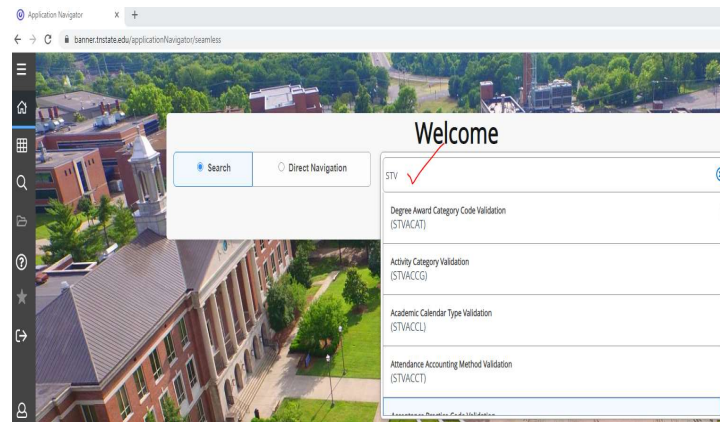


Search for Forms/Pages

Banner 8

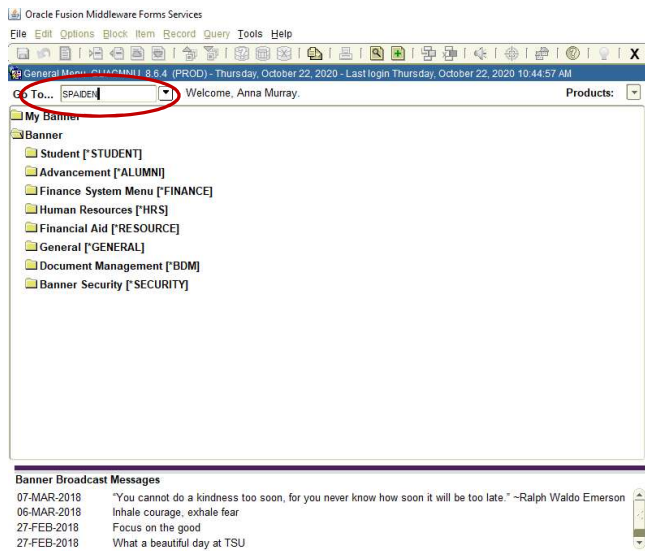


Banner 9

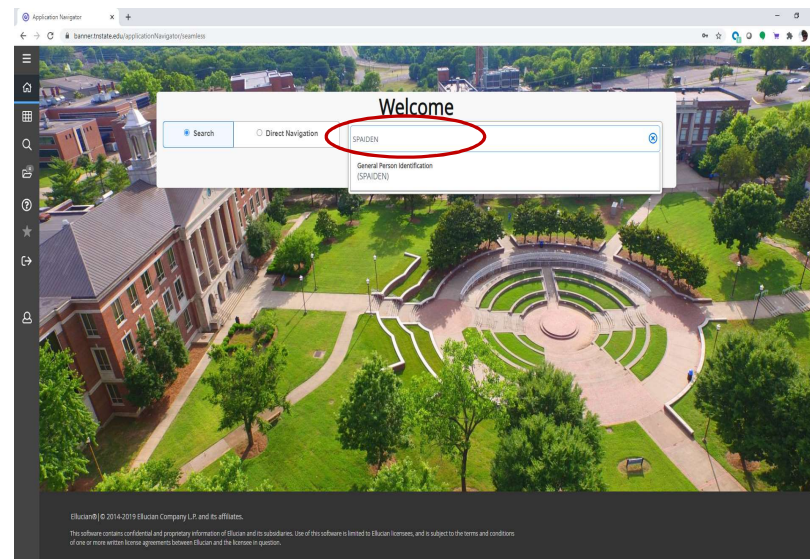


Direct access to form

Banner 8



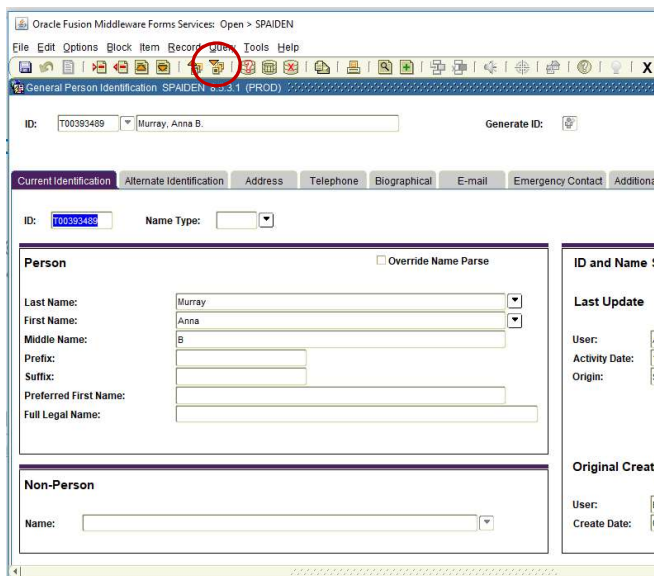
Banner 9



Next Block

Banner 9 - Click the 'Go' button, the 'Next Section' navigation arrow, or use ALT+PgDn

Banner 8



Oracle Fusion Middleware Forms Services: Open > SPAIDEN

File Edit Options Block Item Record **Go** Tools Help

General Person Identification SPAIDEN 6.3.1 (PROD)

ID: T00393489 Murray, Anna B. Generate ID: [icon]

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

ID: T00393489 Name Type: [dropdown]

Person ☐ Override Name Parse

Last Name: Murray
First Name: Anna
Middle Name: B
Prefix:
Suffix:
Preferred First Name:
Full Legal Name:

Non-Person

Name: [dropdown]

ID and Name

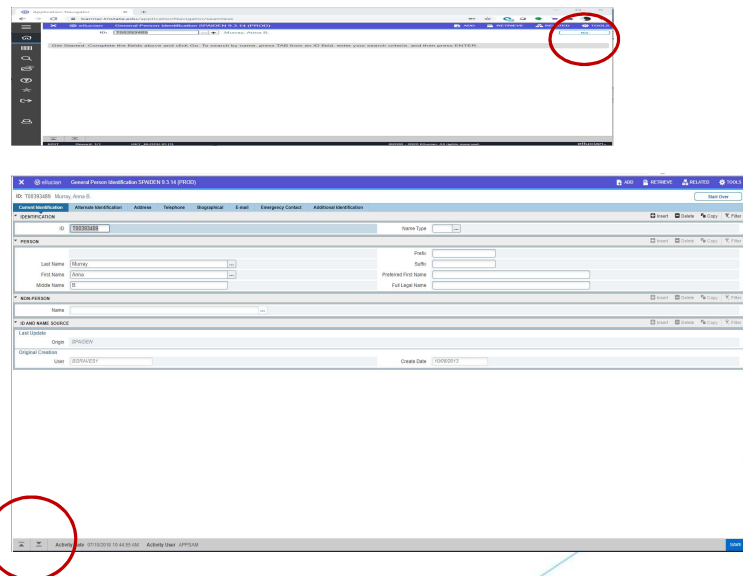
Last Update

User:
Activity Date:
Origin:

Original Create

User:
Create Date:

Banner 9



Oracle Fusion Middleware Forms Services: Open > SPAIDEN

File Edit Options Block Item Record **Go** Tools Help

General Person Identification SPAIDEN 6.3.1 (PROD)

ID: T00393489 Murray, Anna B. Generate ID: [icon]

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

ID: T00393489 Name Type: [dropdown]

Person ☐ Override Name Parse

Last Name: Murray
First Name: Anna
Middle Name: B
Prefix:
Suffix:
Preferred First Name:
Full Legal Name:

Non-Person

Name: [dropdown]

ID and Name

Last Update

User:
Activity Date:
Origin:

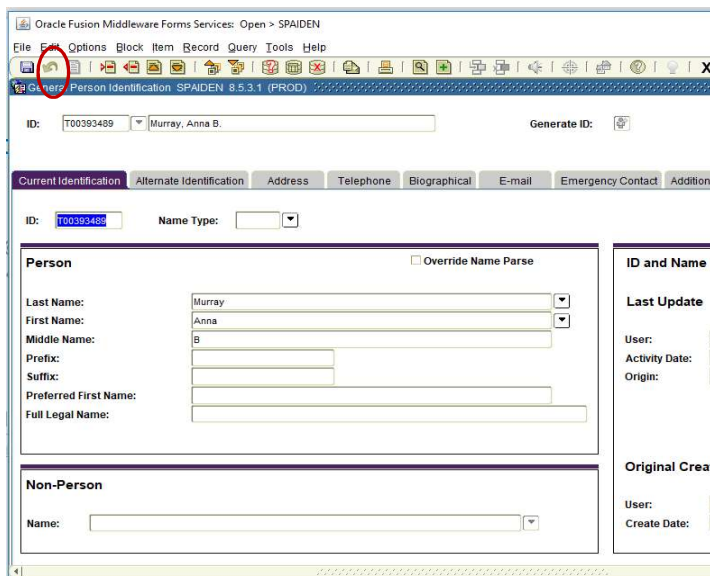
Original Create

User:
Create Date:

Rollback

Banner 9 - Click the 'Start Over' button OR use F5

Banner 8



Oracle Fusion Middleware Forms Services: Open > SPAIDEN

File Edit Options Block Item Record Query Tools Help

General Person Identification SPAIDEN 8.5.3.1 (PROD)

ID: T00393489 Murray, Anna B. Generate ID: [icon]

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

ID: T00393489 Name Type: [dropdown]

Person ☐ Override Name Parse

Last Name: Murray
First Name: Anna
Middle Name: B
Prefix:
Suffix:
Preferred First Name:
Full Legal Name:

Non-Person

Name: [dropdown]

ID and Name

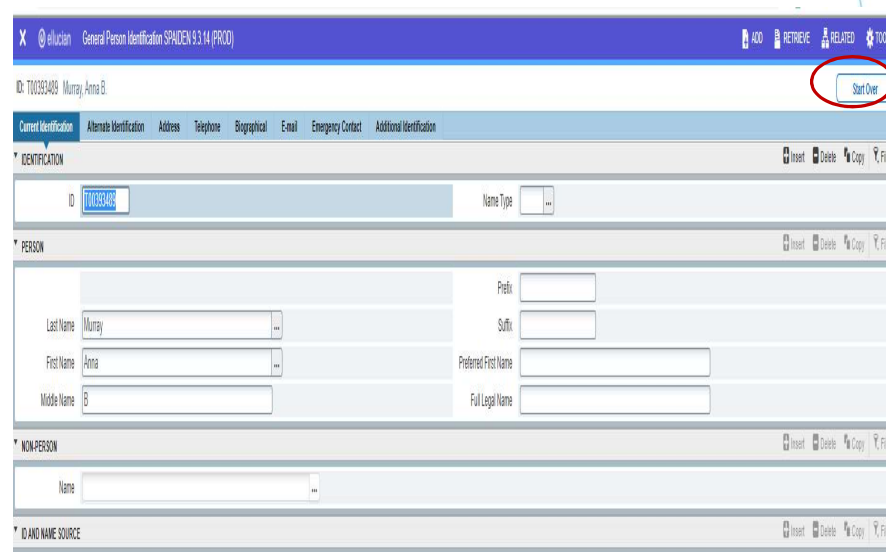
Last Update

User:
Activity Date:
Origin:

Original Create

User:
Create Date:

Banner 9



General Person Identification SPAIDEN 9.3.14 (PROD)

ID: T00393489 Murray, Anna B. [Start Over]

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

IDENTIFICATION

ID: T00393489 Name Type: [dropdown]

PERSON

Last Name: Murray First Name: Anna Middle Name: B Prefix: Suffix: Preferred First Name: Full Legal Name:

NON-PERSON

Name: [dropdown]

ID AND NAME SOURCE

Options = Related or Tools

Banner 8

The screenshot shows the Banner 8 software interface. The 'Options' menu is circled in red. The interface includes a menu bar with 'File', 'Edit', 'Options', 'Block', 'Item', 'Record', 'Query', 'Tools', and 'Help'. Below the menu bar is a toolbar with various icons. The main window is titled 'Banner 8 (PROD)' and contains several tabs: 'General', 'Address', 'Telephone', 'Biographical', 'E-mail', 'Emergency Contact', 'Additional Identification', and 'System Data Summary (QUASYST)'. The 'General' tab is active, showing fields for 'ID', 'Name Type', 'Last Name', 'First Name', 'Middle Name', 'Prefix', 'Suffix', 'Preferred First Name', and 'Full Legal Name'. The 'ID' field contains '00000000' and the 'Name Type' dropdown is set to 'Person'. The 'Last Name' field contains 'Murray', 'First Name' contains 'Anna', and 'Middle Name' contains 'B'. The 'Non-Person' section is also visible with a 'Name' field.

Banner 9

The screenshot shows the Banner 9 software interface. The 'Options' menu is circled in red. The interface includes a menu bar with 'File', 'Edit', 'Options', 'Block', 'Item', 'Record', 'Query', 'Tools', and 'Help'. Below the menu bar is a toolbar with various icons. The main window is titled 'Banner 9 (PROD)' and contains several tabs: 'General', 'Address', 'Telephone', 'Biographical', 'E-mail', 'Emergency Contact', 'Additional Identification', and 'System Data Summary (QUASYST)'. The 'General' tab is active, showing fields for 'ID', 'Name Type', 'Last Name', 'First Name', 'Middle Name', 'Prefix', 'Suffix', 'Preferred First Name', and 'Full Legal Name'. The 'ID' field contains '00000000' and the 'Name Type' dropdown is set to 'Person'. The 'Last Name' field contains 'Murray', 'First Name' contains 'Anna', and 'Middle Name' contains 'B'. The 'Non-Person' section is also visible with a 'Name' field.

Tools

Contains various utilities, including Print and Export and item properties.

The screenshot displays the Banner SPAIDEN application interface. The browser address bar shows the URL `banner.tnstate.edu/applicationNavigator/seamless`. The application title is "General Person Identification SPAIDEN 9.3.14 (PROD)". The main content area shows the "Current Identification" tab for ID: T00393489, Murray, Anna B. The interface includes a left sidebar with navigation icons and a top navigation bar with buttons for ADD, RETRIEVE, RELATED, and TOOLS. The TOOLS button is circled in red. A dropdown menu is open from the TOOLS button, listing various actions and options. The bottom status bar shows the Activity Date (07/10/2018 10:44:55 AM), Activity User (APPSAM), and a SAVE button.

ACTIONS	
Refresh	F5
Export	Shift+F1
Print Screenshot	Ctrl+Alt+P
Clear Record	Shift+F4
Clear Data	Shift+F5
Item Properties	
Display ID Image	
Exit Quickflow	
About Banner	

OPTIONS	
Current Identification	
Alternate Identification	

Activity Date: 07/10/2018 10:44:55 AM Activity User: APPSAM

EDIT Record: 1/1 SPRIDEN_CURRENT.SPRIDEN_ID [1]

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Record Maintenance

Record maintenance is accomplished using the buttons at the top of the section to be edited.
Shortcut keys for record maintenance are unchanged [Insert record = F6; Delete record = SHIFT+F6;
Duplicate record = F4]

Application Navigator x +

banner.tnstate.edu/applicationNavigator/seamless

ellucian General Person Identification SPAIDEN 9.3.14 (PROD) ADD RETRIEVE RELATED TOOLS

ID: T00393489 Murray, Anna B. Start Over

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

IDENTIFICATION

ID T00393489 Name Type ...

PERSON

Prefix: ...

Suffix: ...

Last Name: Murray ...

First Name: Anna ...

Middle Name: B ...

Preferred First Name: ...

Full Legal Name: ...

NON-PERSON

Name: ...

ID AND NAME SOURCE

Last Update: ...

Origin: SPAIDEN

Original Creation: ...

User: BGRAVES1 Create Date: 10/08/2013

Activity Date: 07/10/2018 10:44:55 AM Activity User: APPSAM SAVE

EDIT Record: 1/1 SPRIDEN_CURRENT.SPRIDEN_ID [1] ©2000 - 2020 Ellucian. All rights reserved. ellucian.

See Data

Application Navigator banner.tnstate.edu/applicationNavigator/seamless

ellucian General Person Identification SPAIDEN 9.3.14 (PROD)

ID: T00393489 Murray, Anna B. Start Over

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

TELEPHONE INFORMATION

Telephone Type * AP ... Remit to (Vendor Checks)

Area Code 615

Phone Number 9637693

Extension

International Access

☒ Primary

☐ Unlisted

☐ Inactivate

Comment

Address Type AP ... Remit To (Vendor checks)

Sequence 1 ...

1 of 3 1 Per Page Record 1 of 3

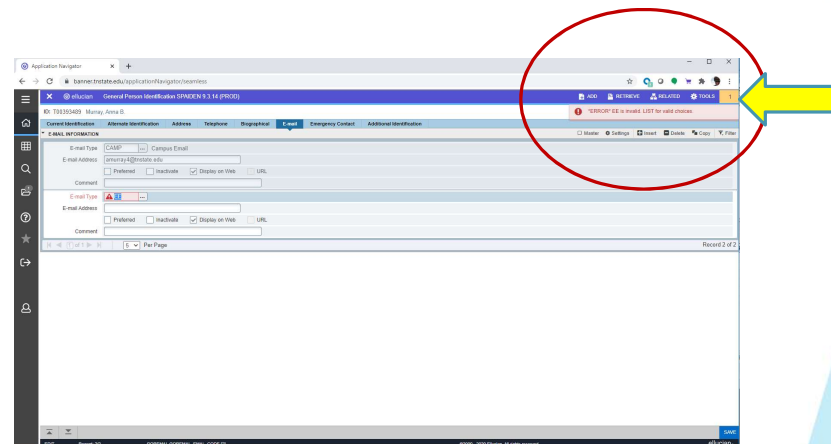
Activity Date 05/04/2018 12:30:25 PM Activity User BWHITE2

SAVE

EDIT Record: 1/3 SPRTELE-SPRTELE_TELE_CODE [1] ©2000 - 2020 Ellucian. All rights reserved. ellucian

Error Messages

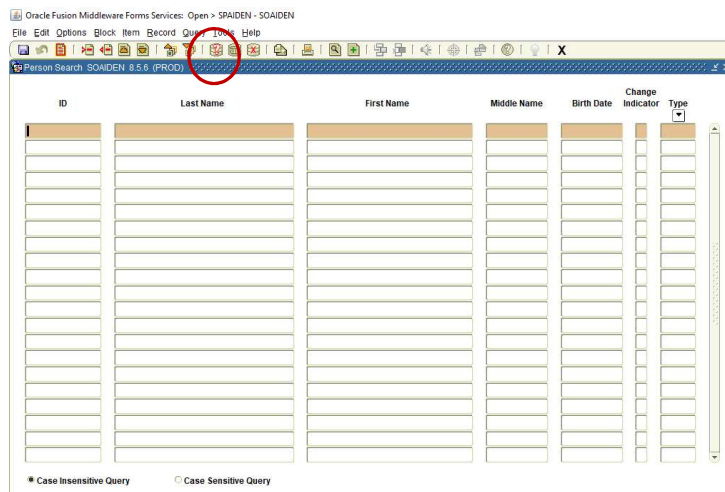
Error and informational messages will sometimes pop up at the top right of the screen. You can click the yellow square to hide the message and click again to display the message again. Messages will cover 'Go' or 'Start Over' buttons, so hide them before clicking buttons.



Query = Filter

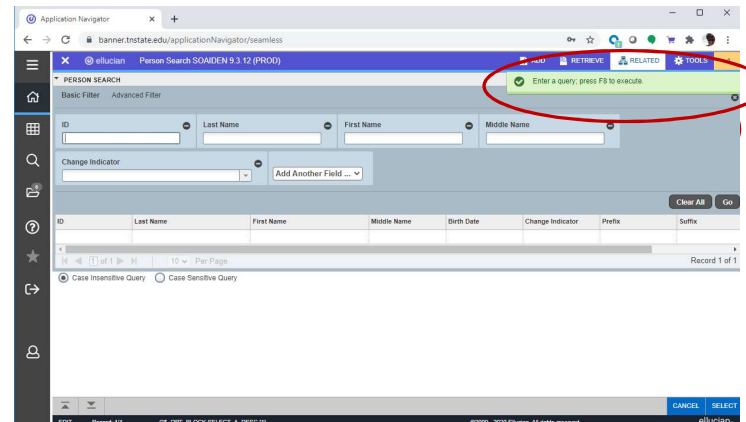
Filtering is the new way of limiting the results shown on the form. It works similar to entering query criteria, except that you specify the field and the value to use in a different way.

Banner 8



The screenshot shows the Banner 8 Person Search form. The title bar indicates 'Oracle Fusion Middleware Forms Services: Open > SPAIDEN - SOAIDEN'. The menu bar includes 'File', 'Edit', 'Options', 'Block', 'Item', 'Record', 'Query', 'Tools', and 'Help'. The toolbar contains various icons, with the 'Query' icon (a magnifying glass) circled in red. Below the toolbar, the form has columns for 'ID', 'Last Name', 'First Name', 'Middle Name', 'Birth Date', 'Change Indicator', and 'Type'. The 'Type' column has a dropdown menu. At the bottom, there are radio buttons for 'Case Insensitive Query' (selected) and 'Case Sensitive Query'.

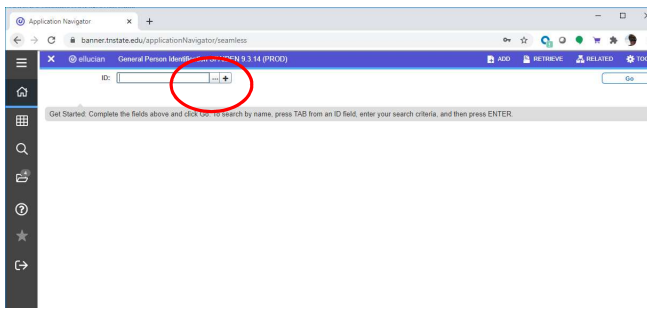
Banner 9



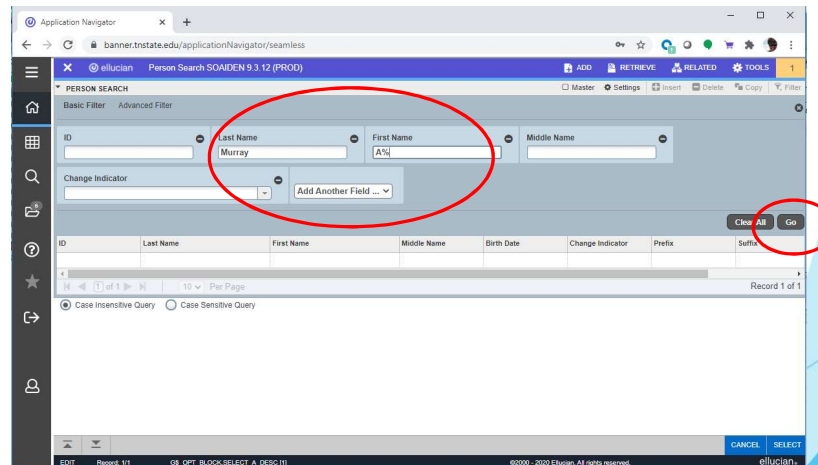
The screenshot shows the Banner 9 Person Search form. The title bar indicates 'Application Navigator' and the browser address bar shows 'banner.tristate.edu/applicationNavigator/seamless'. The form has a 'PERSON SEARCH' section with 'Basic Filter' and 'Advanced Filter' tabs. The 'Basic Filter' tab is active, showing input fields for 'ID', 'Last Name', 'First Name', and 'Middle Name'. Below these are 'Change Indicator' and 'Add Another Field ...' buttons. At the bottom right, there are 'Clear All' and 'Go' buttons. A green status bar at the top right of the form area says 'Enter a query; press F8 to execute.' and is circled in red. At the bottom, there are radio buttons for 'Case Insensitive Query' (selected) and 'Case Sensitive Query'. The bottom of the screen shows a footer with 'Banner 9.3.12', '© 2012 Banner Health A Division of', 'Banner Health', and 'Banner 9.3.12 (PROD)'.

Search for a person or vendor

- ▶ Click on the ellipsis button next to the field to initiate a search



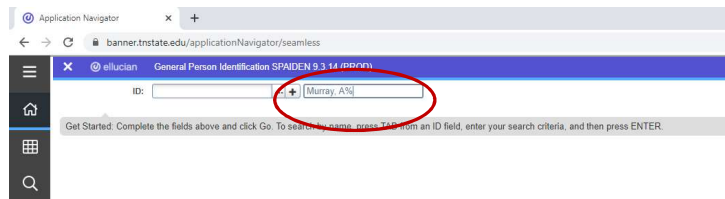
- ▶ Enter as many search field criteria or remove then click the 'Go' button.



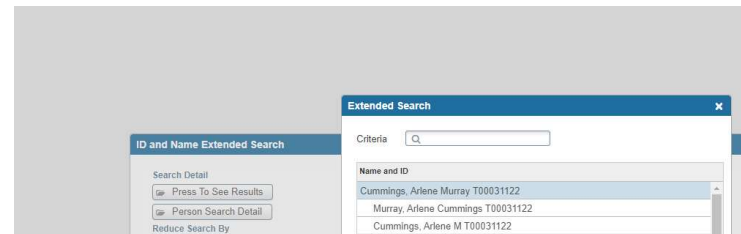
Searching

Alternatively, you can press TAB when in the ID block, which will cause a second entry field to appear.

Press TAB from the ID field for the search field to pop

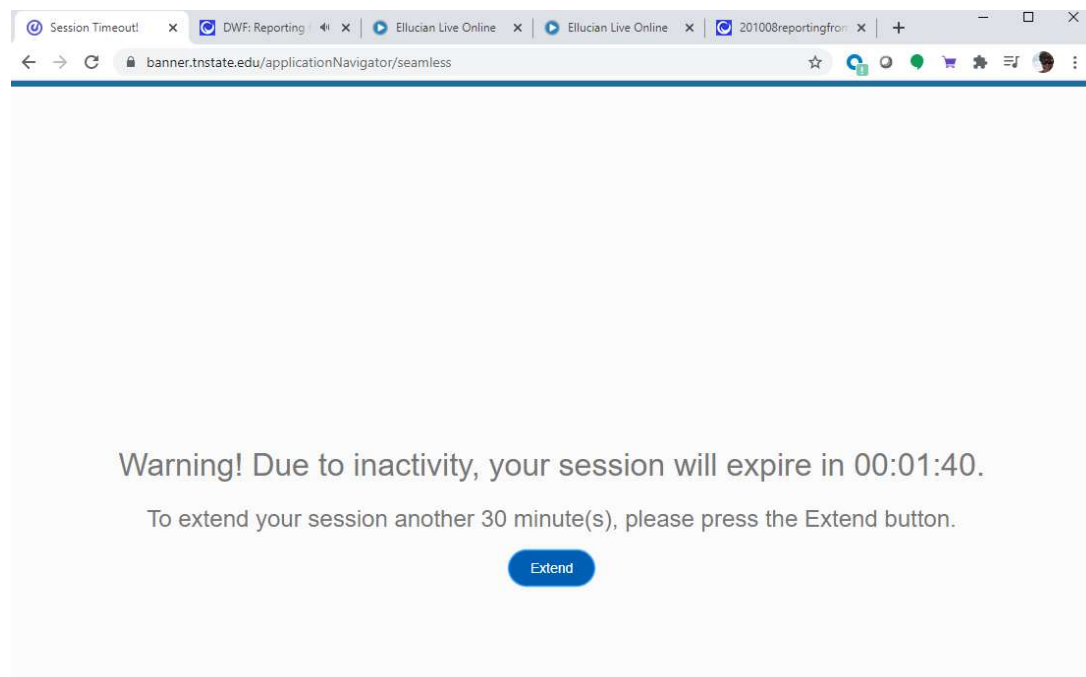


This pop-up window allows you to see results

A screenshot of a pop-up window titled 'ID and Name Extended Search'. It contains a 'Search Detail' section with buttons for 'Press To See Results', 'Person Search Detail', and 'Non-Person Search Detail'. A 'Person/Non-Person Count' of 2 is displayed. Below this is a 'Reduce Search By' section with radio buttons for 'Group Type' (Person, Non-Person, Both) and input fields for 'City', 'State or Province', 'ZIP or Postal Code', 'Name Type', 'Birth Date', and 'Gender'. At the bottom, instructions read: 'Press Enter Query or select button to clear search.' and 'Enter search criteria then press Execute Query or select button to reduce search.'

Inactivity

As is currently the case, you will be logged out of Banner after 30 minutes of inactivity. However, a warning message will now display after 25 minutes letting you know that you will be logged out if you don't extend your session. Clicking on 'Extend' will give you a fresh 30 minutes.



Other Resources

- ▶ OTS has a website dedicated to the upgrade to Banner 9 with information and useful resources: <http://www.tnstate.edu/banner/>
- ▶ Banner 9 URL: <https://banner.tnstate.edu/applicationNavigator>
- ▶ Youtube https://www.youtube.com/watch?v=6Mqqy0lez_c
- ▶ For specific questions about a particular form or process, contact the appropriate office for assistance.
- ▶ If you discover something that doesn't work properly or you get an unexpected error, please navigate to [ServiceNow\(SNOW\)](#), log in with your TNSTATE email username and password, and submit a ticket. If you need instructions on how to submit a ticket, click with details about the issue so that someone can look into it.
- ▶ Color wheel for personal preferences: <https://htmlcolorcodes.com/>