



# Banner 9 Basic Navigation

OTS Applications Team



# Zoom notes before we begin

## Purpose:

This session is a basic 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

- All muted
- Questions – please post in chat
- There will be time at the end of the session for questions
- 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
- Live demo



# Finding Banner 9 link and information

## Accessing Banner 9 while on campus

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

### 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  
TSU Banner 9 Basic Training - October 23, 2020  
TSU Banner 9 Basic Training pdf/slides

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

**Banner 9 Module FAQs**  
Finance  
Human Resources  
Student and Financial Aid

**Banner 9 Guides**  
Navigating Banner 9 Quick Reference  
Banner 8 vs Banner 9 Keyboard

### Access to Systems



**PROD (Live data)**  
Banner 8  
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.


**DEVL** (Cloned Mar 11, 2020)  
Banner 8  
Self-Service Banner  
Banner 9

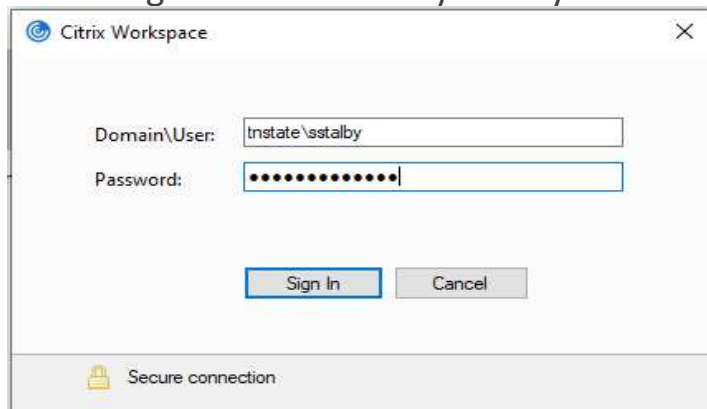
**STGE** (Cloned September 8, 2020 11:59pm)  
Banner 8  
Self-Service Banner  
Banner 9

**TEST** (Cloned Mar 27,2020)  
Banner 8  
Self-Service Banner  
Banner 9



# Accessing Banner 9 while remote

- ▶ Login to Citrix Workspace   
Domain\User:tnstate\yourusername  
Same login credentials as your MyTSU



- ▶ Choose the Banner 9 icon to login





# Banner 8 vs Banner 9 keys

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

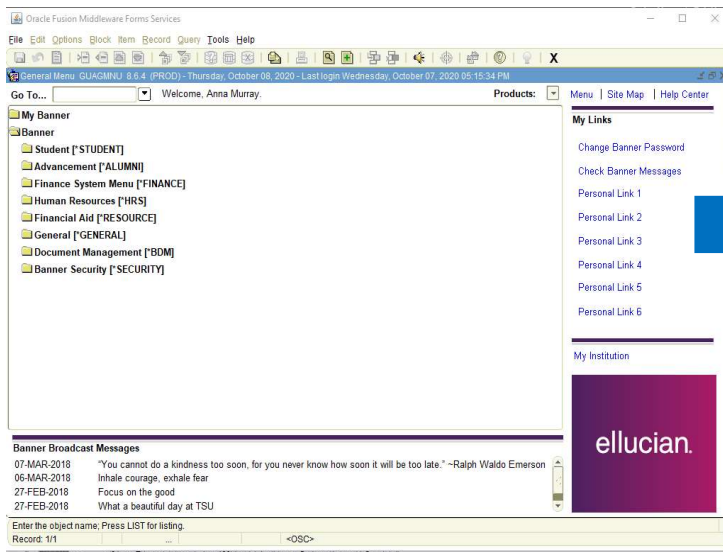
F10 still saves, F7 still starts a query, F8 still executes a query

QUICK REFERENCE SHEET		
Actions with new or updated keyboard combinations in Banner 9 are indicated by bold entries.		
Action	Banner 8	Banner 9
<b>APPLICATION NAVIGATOR</b>		
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
<b>BANNER DOCUMENT MANAGEMENT (BDM)</b>		
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
<b>Clear Page or Start Over</b>	SHIFT+F7	<b>F5</b>
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
<b>Expand/Collapse Drop-down Field</b>	Click field	<b>ALT+Down Arrow</b>
<b>First Page</b>	Not applicable	<b>CTRL+Home</b>
Insert/Create Record	F6	F6
<b>Last Page</b>	Not applicable	<b>CTRL+End</b>
List of Values	F9	F9
<b>More Information</b>	ALT+H	<b>CTRL+SHIFT+U</b>
Next Field or Item	Tab	Tab
Next Page Down	PgDn	PgDn
<b>Next Section (Block)</b>	CTRL+PgDn	<b>ALT+PgDn</b>
<b>Open Menu Directly</b>	F5	<b>CTRL+M</b>
<b>Open Related Menu</b>	Not applicable	<b>ALT+SHIFT+R</b>
<b>Open Tools Menu</b>	Not applicable	<b>ALT+SHIFT+T</b>
<b>Page Tab 1</b>		<b>CTRL+SHIFT+1</b>
<b>Page Tab 2</b>		<b>CTRL+SHIFT+2</b>
<b>and so on</b>	Not applicable	<b>and so on</b>
Previous Field or Item	SHIFT+Tab	SHIFT+Tab
Previous Page Up	PgUp	PgUp
<b>Previous Section (Block)</b>	CTRL+PgUp	<b>ALT+PgUp</b>
<b>Print</b>	SHIFT+F8	<b>CTRL+P</b>
<b>Refresh or Rollback</b>	SHIFT+F7	<b>F5</b>
Save	F10	F10
Search or Open Filter Query	F7	F7
<b>Select on a Called Page</b>	SHIFT+F3	<b>ALT+S</b>
<b>Toggle Multi/Single Records View</b>	Not applicable	<b>CTRL+G</b>
Up/Previous Record	Up Arrow	Up Arrow

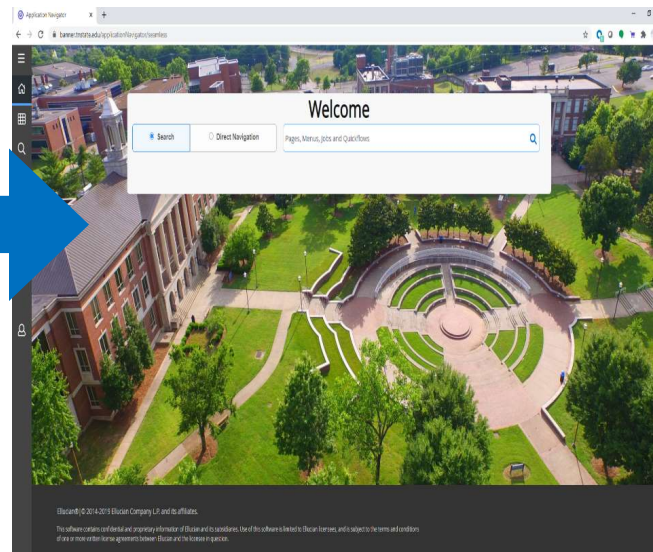


# Banner Gets a New Look

## Banner 8 Menu

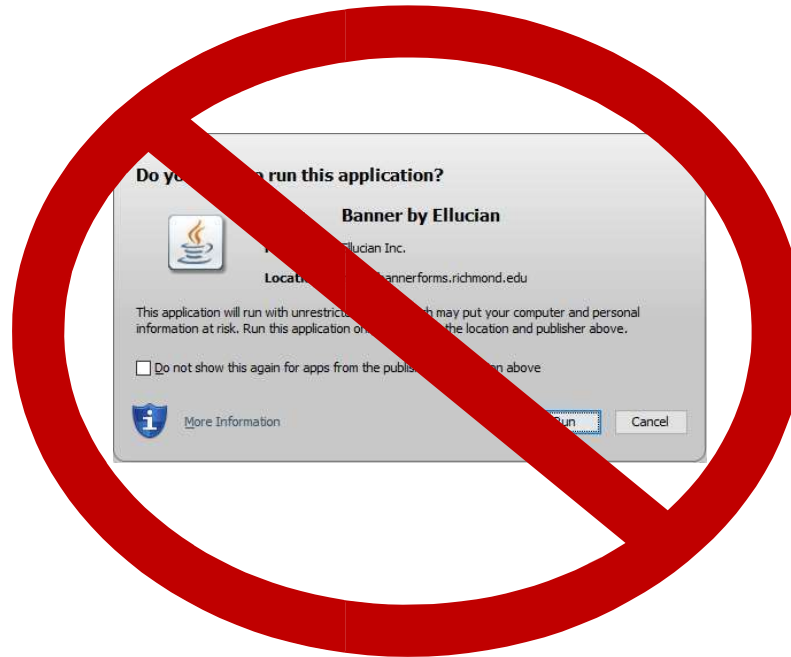


## Banner 9 Menu





# Benefit: No more Java!

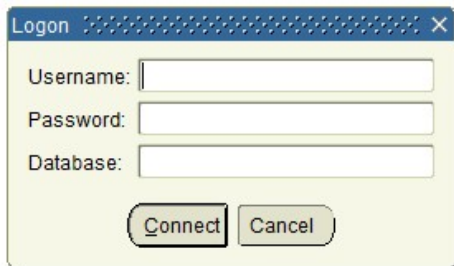




## Benefits: No Banner-specific password

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

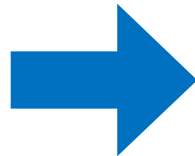
A screenshot of the Banner 8 login dialog box. It has a title bar that says "Logon" with a close button. Inside, there are three input fields: "Username:", "Password:", and "Database:". Below the fields are two buttons: "Connect" and "Cancel".

Logon [Close]

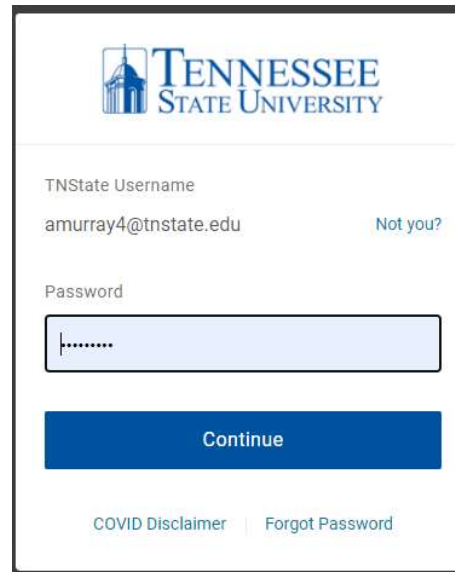
Username:


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!





## Key terminology changes

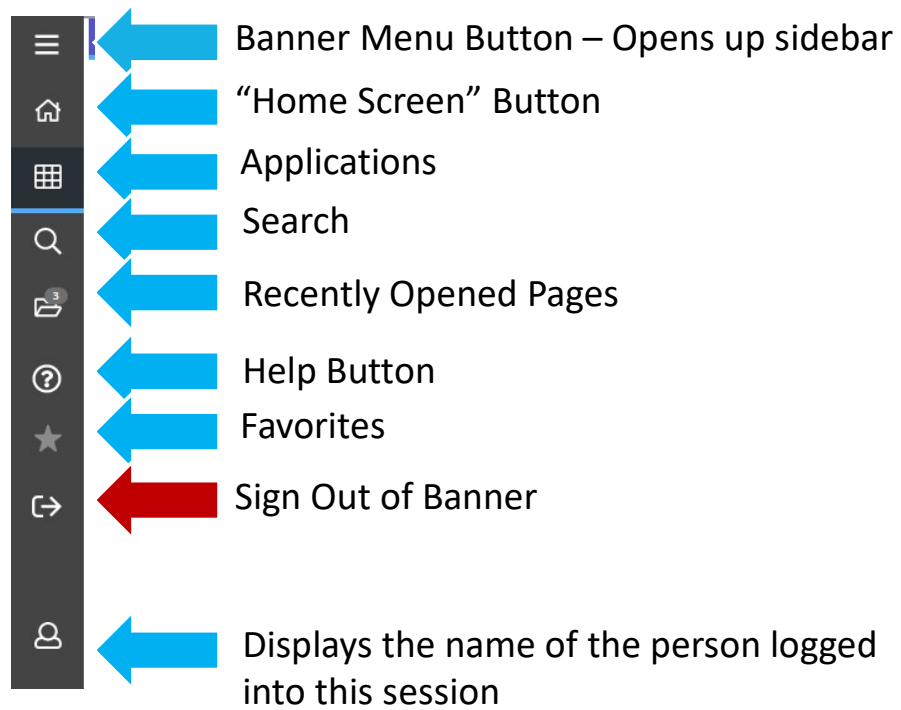
IN BANNER 8	IN BANNER 9
FORMS	PAGES
BLOCKS	SECTIONS
NEXT BLOCK	GO BUTTON
ROLLBACK	START OVER
QUERY	FILTER

### Shortcut Key changes

Banner 8		Banner 9	
	Shortcut Key		Shortcut Key
Next Block	Cnrl + PgDn	Next Section	Alt + PgDn
Previous Block	Cnrl + PgUp	Previous Section	Alt + PgUp
Rollback	Shift + F7	Start Over/Refresh	F5



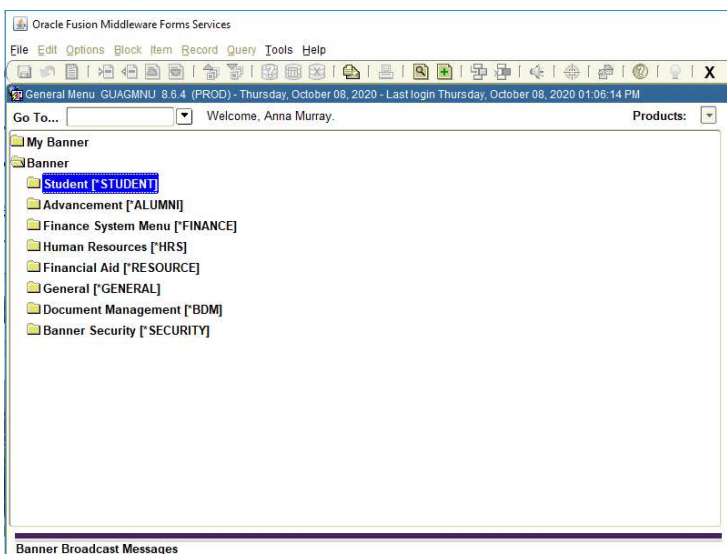
## Banner 9 Menu Bar



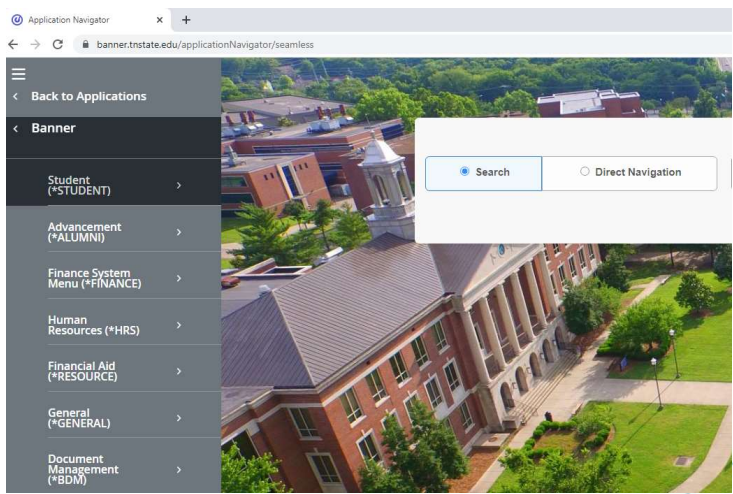


# Menus

## Banner 8



## Banner 9

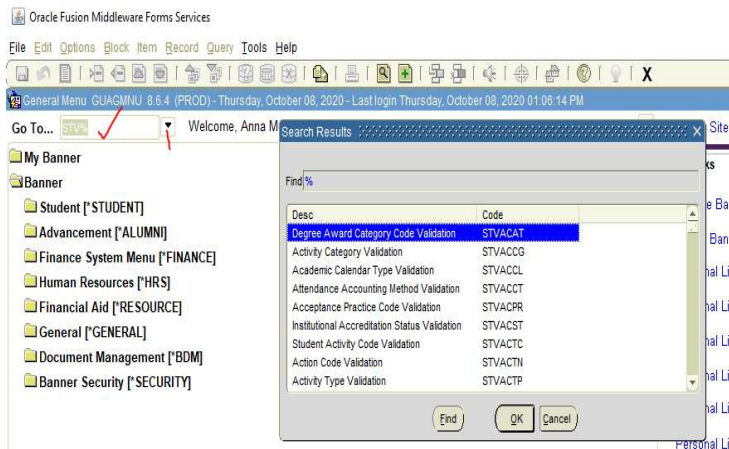




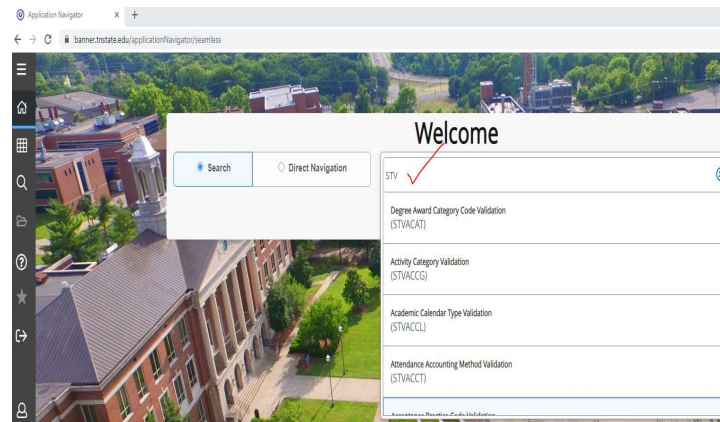
# Search for Forms/Pages

## % = wildcard

### Banner 8



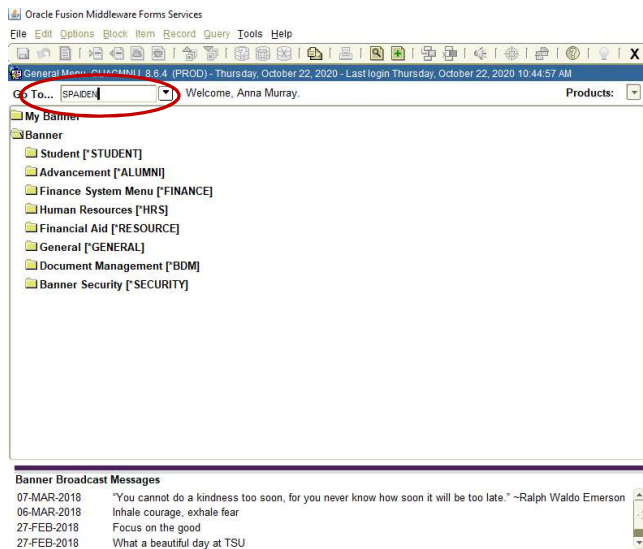
### Banner 9



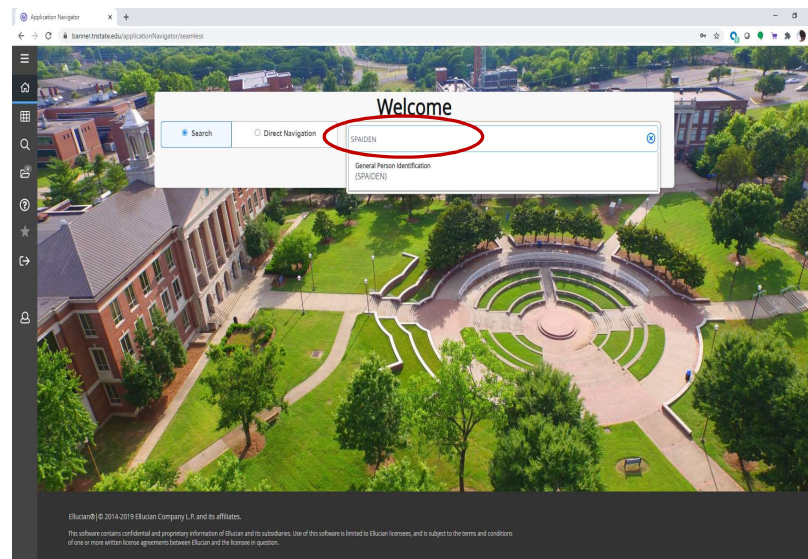


# Direct access to forms / pages

## Banner 8



## Banner 9





# Next Block

Banner 9 - Go Button

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 9.3.14 (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 Creat**

User:  
Create Date:

## Banner 9

Go

ellucian General Person Identification SPAIDEN 9.3.14 (PROD)

ADD RETRIEVE RELATED TOOLS

ID: T00469659 Saint-Alby-Hyeme, Sylvie R. Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

General Person Identification SPAIDEN 9.3.14 (PROD)

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

Last Update: [dropdown]  
Original Create: [dropdown]  
User: [dropdown]  
Create Date: [dropdown]

Active Date: [dropdown]

Go



# 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

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

**NON-PERSON**

Name: [dropdown]

**ID AND NAME SOURCE**



# Options tab = Related tab

Banner 8

Oracle Fusion Middleware Form Services: Open > SPAIDEN

File Edit **Options** Back Item Record Query Tools Help

Current Identification  
Alternate Identification  
Address  
Telephone  
Biographical  
E-mail  
Emergency Contact  
Additional Identification  
System Data Summary (GUASYST)

3.1 (PROD)

ID:  Generate ID:

Address Telephone Biographical E-mail Emergency Contact Additional

ID:  Name Type:

**Person** ☐ Override Name Parse

Last Name:   
First Name:   
Middle Name:   
Prefix:   
Suffix:   
Preferred First Name:   
Full Legal Name:

**Non-Person**

Name:

**ID and Name S**

Last Update

User:   
Activity Date:   
Origin:

**Original Creati**

User:   
Create Date:

Banner 9

Oracle Fusion Middleware Form Services: Open > SPAIDEN

File Edit **Options** Back Item Record Query Tools Help

Current Identification  
Alternate Identification  
Address  
Telephone  
Biographical  
E-mail  
Emergency Contact  
Additional Identification  
System Data Summary (GUASYST)

3.1 (PROD)

ID:  Generate ID:

Address Telephone Biographical E-mail Emergency Contact Additional

ID:  Name Type:

**Person** ☐ Override Name Parse

Last Name:   
First Name:   
Middle Name:   
Prefix:   
Suffix:   
Preferred First Name:   
Full Legal Name:

**Non-Person**

Name:

**ID and Name S**

Last Update

User:   
Activity Date:   
Origin:

**Original Creati**

User:   
Create Date:



# 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 a form for "Murray, Anna B." with fields for ID, Name Type, Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name. The "Tools" menu is open, showing options like Refresh, Export, Print Screenshot, Clear Record, Clear Data, Item Properties, Display ID Image, Exit Quickflow, About Banner, Current Identification, and Alternate Identification. The "Tools" menu is circled in red.

Application Navigator

banner.tnstate.edu/applicationNavigator/seamless

ellucian General Person Identification SPAIDEN 9.3.14 (PROD)

ID: T00393489 Murray, Anna B.

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

IDENTIFICATION

ID T00393489 Name Type

PERSON

Last Name Murray Prefix

First Name Anna Suffix

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

EDIT Record: 1/1 SPRIDEN\_CURRENT.SPRIDEN\_ID [1]

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TOOLS

Search

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



# 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

Last Name Murray Prefix ...

First Name Anna Suffix ...

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



# Message types

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. There are four message notification types.

1. **Error Notification** – will display a “!” in a circle when message displayed



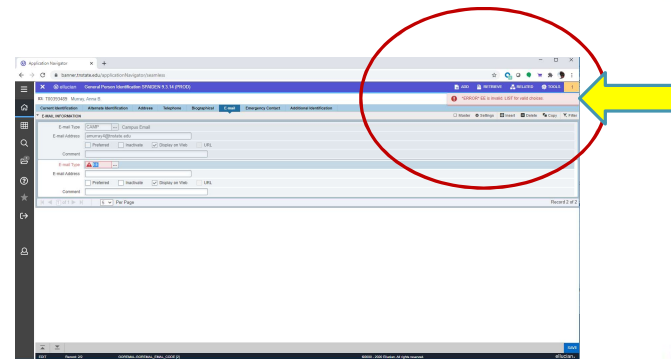
2. **Info Notification** – will display an “i” in a circle when message displayed. May display an OK button that you must select to continue.



3. **Success Notification** – will display a checkmark in a circle when message displayed



5. **Warning Notification** – will display an exclamation “!” in a yield sign when message displayed. Will also display two buttons a Yes button and a No button select one to continue.





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

[illegible]

## Banner 9



[X](#)
[ellucian](#)
General Person Identification SPAIDEN 9.3.14 (PROD)
[ADD](#)
[RETRIEVE](#)
[RELATED](#)
[TOOLS](#)

ID: T00495659 Saint-Alby-Hyeme, Sylvie R

[Current Identification](#)
[Alternate Identification](#)
[Address](#)
[Telephone](#)
[Biographical](#)
[E-mail](#)
[Emergency Contact](#)
[Additional Identification](#)
[Start Over](#)

E-MAIL INFORMATION

☐ Master
☐ Settings
☐ Insert
☐ Delete
☐ Copy
☐ Filter

E-mail Type:

E-mail Address:

☒ Preferred
☐ Inactivate
☒ Display on Web
☐ URL

Comment:

E-mail Type:

E-mail Address:

☐ Preferred
☐ Inactivate
☐ Display on Web
☐ URL

Comment:

Record 1 of 2



# Search for a person or vendor

## Banner 8

ID:

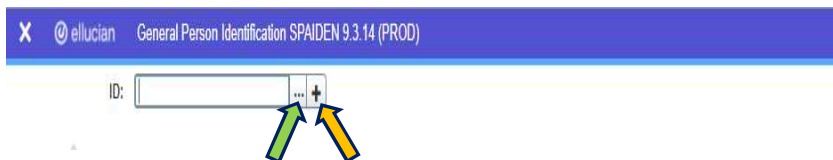
Banner 8 search interface showing an ID input field and a 'Generate ID' button. A green arrow points to the ID field, and a yellow arrow points to the 'Generate ID' button.

## Banner 9

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

ellucian General Person Identification SPAIDEN 9.3.14 (PROD)

ID:

Banner 9 search interface showing an ID input field and an ellipsis button. A green arrow points to the ID field, and a yellow arrow points to the ellipsis button.

Enter as many criteria in the search field then click the 'Go' button.

Application Navigator

banner.tristate.edu/applicationNavigator/seamless

ellucian Person Search SPAIDEN 9.3.12 (PROD)

PERSON SEARCH

Basic Filter Advanced Filter

ID:  Last Name:  First Name:  Middle Name:

Change Indicator:  Add Another Field ...

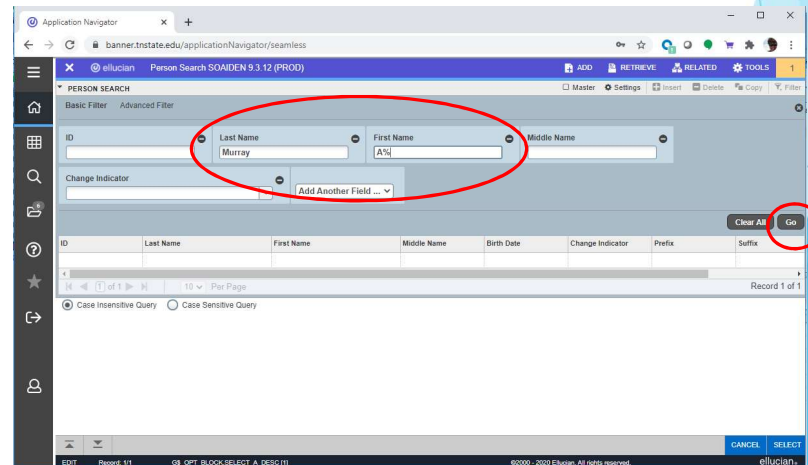
Clear All Go

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix

Record 1 of 1

Case Insensitive Query Case Sensitive Query

EDIT Record: 1/1 QB\_OPT\_BLOCK\_SELECT\_A\_DESC (1) 60000 - 2020 Ellucian. All rights reserved. ellucian

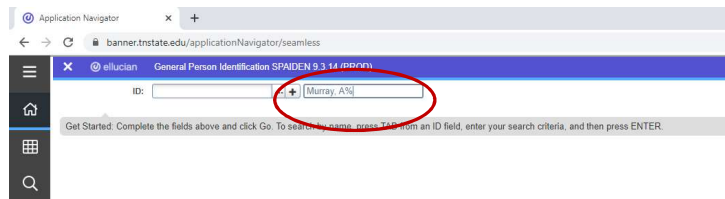
Banner 9 search interface screenshot showing the search criteria fields (Last Name, First Name, Middle Name) and the 'Go' button. A red circle highlights the 'Go' button.



# Search for a person or vendor cont'd

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



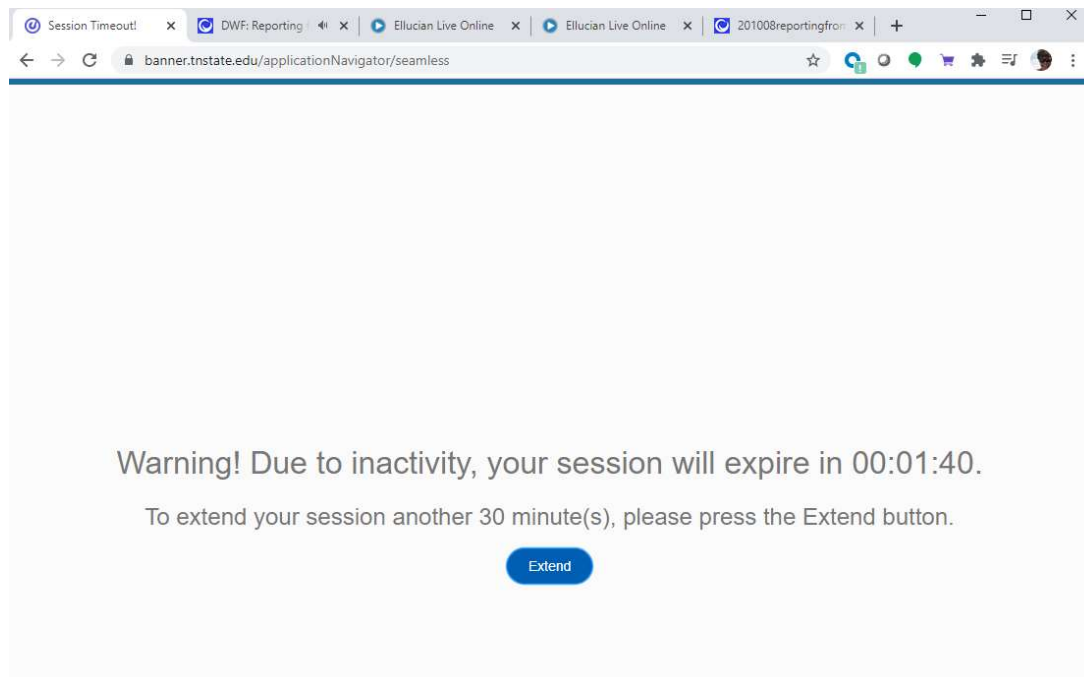
This pop-up window allows you to see results

A screenshot of a pop-up window titled 'ID and Name Extended Search'. The window has a search bar at the top. Below the search bar, there are two buttons: 'Press To See Results' and 'Person Search Detail'. To the right of these buttons, there's a label 'Person/Non-Person Count' with the value '2'. Below the buttons, there's a section titled 'Reduce Search By' with several input fields: 'Group Type' (radio buttons for Person, Non-Person, Both), 'City', 'State or Province', 'ZIP or Postal Code', 'Name Type', 'Birth Date', and 'Gender'. At the bottom, there's a small text box that says 'Press Enter Query or select button to clear search.' and another that says 'Enter search criteria then press Execute Query or select button to reduce search.'A screenshot of a pop-up window titled 'Extended Search'. The window has a search bar at the top. Below the search bar, there's a section titled 'Name and ID' with a list of search results. The results are: 'Cummings, Arlene Murray T00031122', 'Murray, Arlene Cummings T00031122', and 'Cummings, Arlene M T00031122'. A blue line points from the 'Murray, A%' text in the first screenshot to the 'Murray, Arlene Cummings T00031122' result in this screenshot.



# 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 of 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=6Mqgy0lez\\_c](https://www.youtube.com/watch?v=6Mqgy0lez_c)
- ▶ For specific questions about a particular form or process, contact the appropriate office for assistance.
- ▶ If you discover something that does not 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/>