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

Accessing Banner 9 while remote

▶ Login to Citrix Workspace
Domain\User:tnstate\yourusername
Same login credentials as your MyTSU
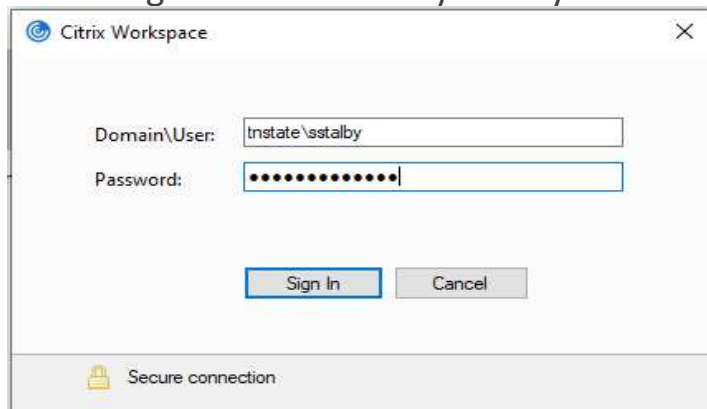
▶ Choose the Banner 9 icon to login

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
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 **Page Tab 2** **and so on**	Not applicable	**CTRL+SHIFT+1** **CTRL+SHIFT+2** **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
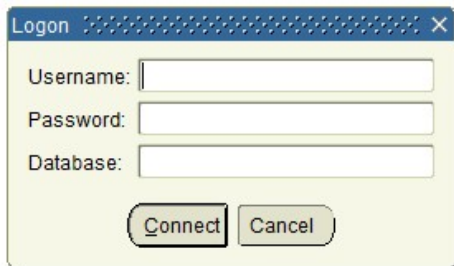
Banner 8 Menu
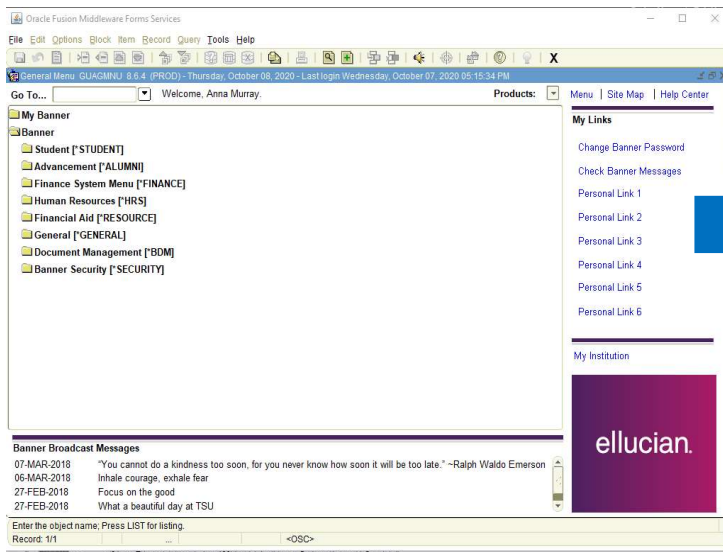
Banner 9 Menu
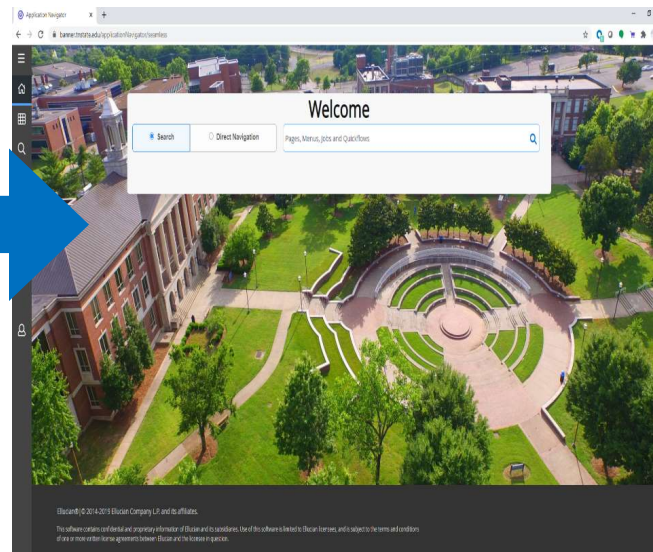
Benefit: No more Java!
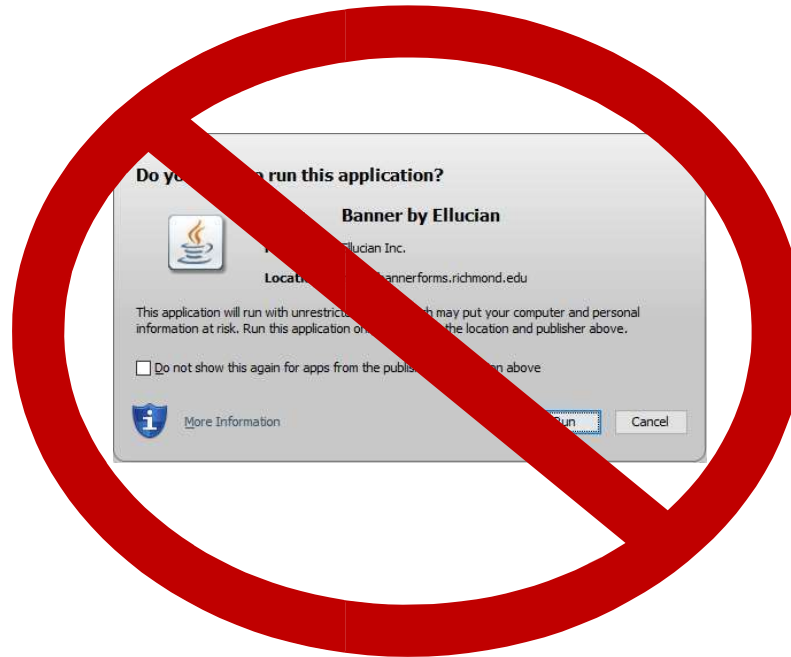
Benefits: No Banner-specific password

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)
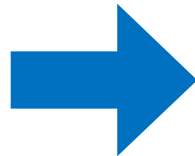
Banner 8 login

Banner 9 login

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

Banner Menu Button – Opens up sidebar

"Home Screen" Button

Applications

Search

Recently Opened Pages

Help Button

Favorites

Sign Out of Banner

Displays the name of the person logged into this session
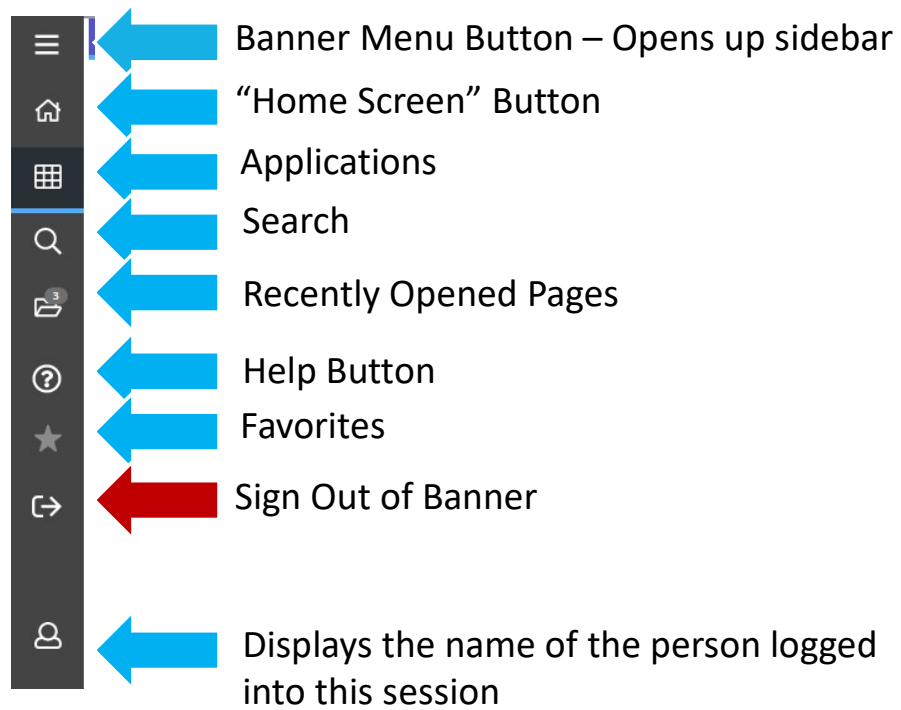
Menus
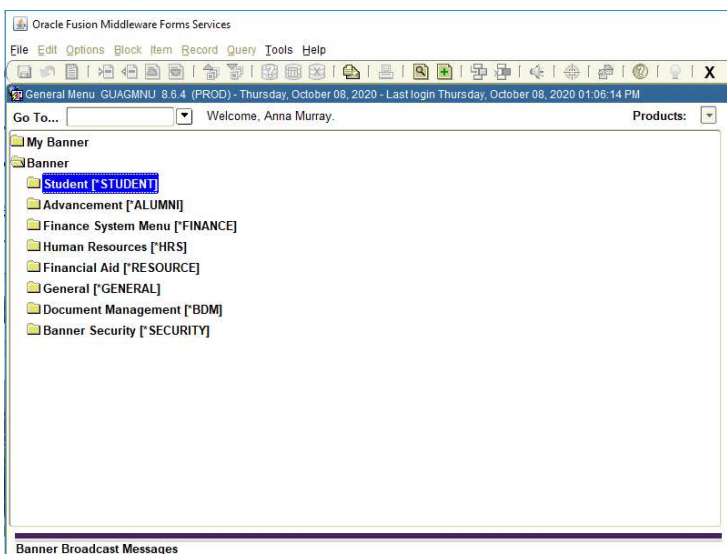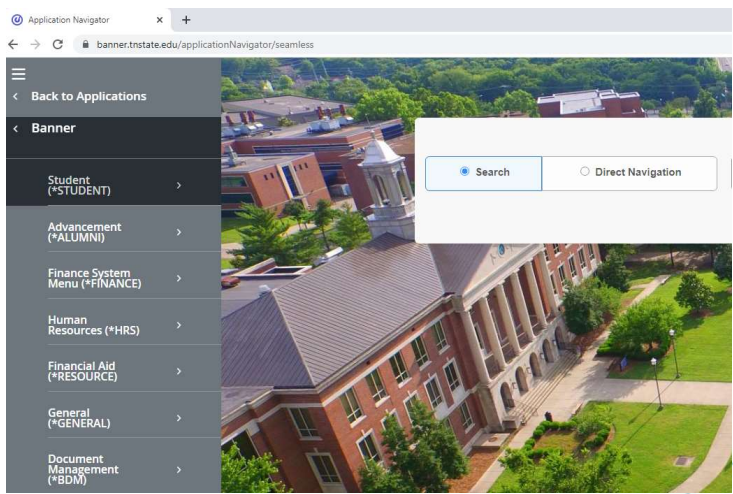
Banner 8

Banner 9

Search for Forms/Pages
% = wildcard

Banner 8
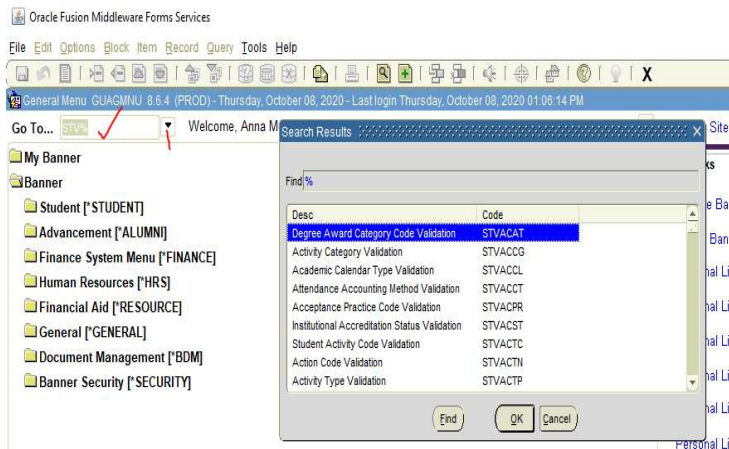
Banner 9
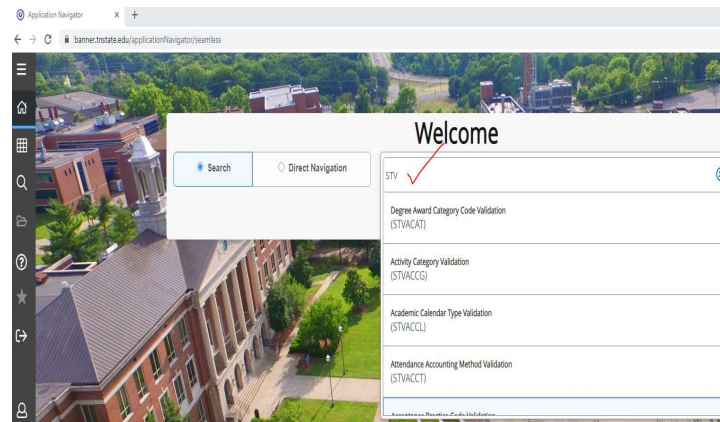
Direct access to forms / pages

Banner 8
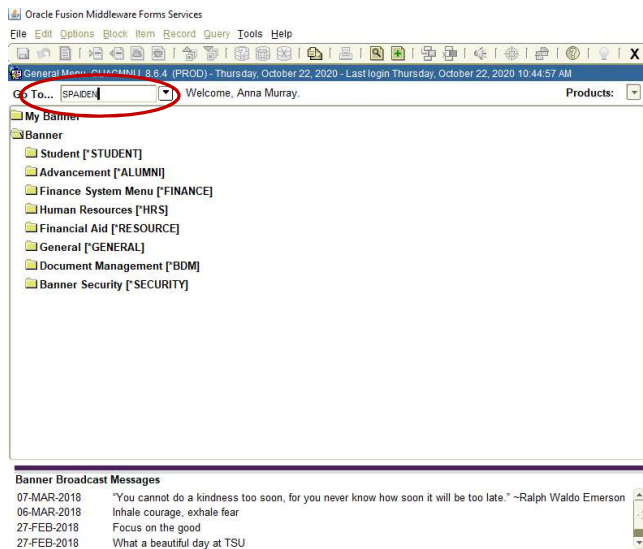
Banner 9
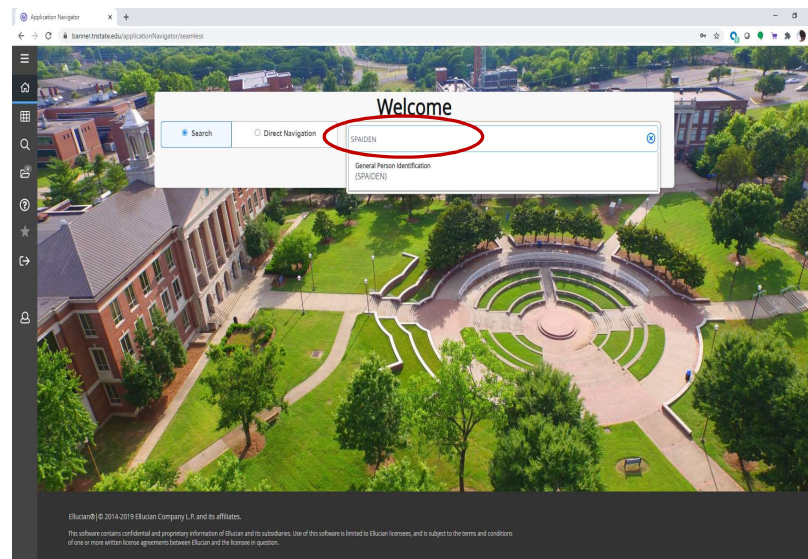
Next Block

Banner 9 - Go Button
Next Section navigation arrow or use ALT+PgDn

Banner 8

Banner 9

Rollback

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

Banner 8

Banner 9

Start Over

Options tab = Related tab

Banner 8

Banner 9

Tools

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

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

See Data

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
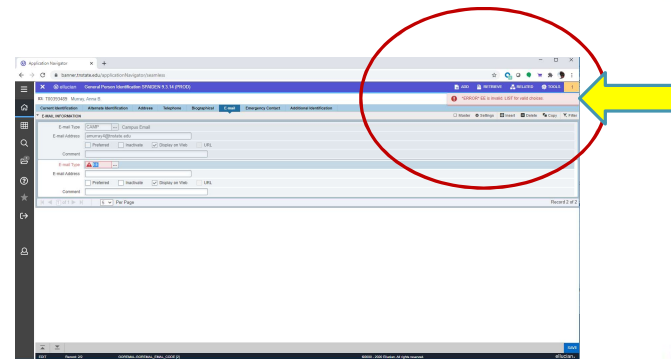
Error Messages – Red
❗ *ERROR* Pay Event Overlaps With Payroll Year: 2017 Pay Id: BW Pay Number: 2

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

Informational Messages – Blue
ℹ️ Banner
No matches found, create as new?
[Yes] [No]

3.

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

Successful save of data – Green
✔️ Saved successfully (1 rows saved)

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.

Warning Messages– Yellow
⚠️ New ID Created
Generated ID: R01300101. Identification record created. Biographical record not created. Address record create failed. Telephone record not created. E-mail record not created. Additional ID not created.
[OK]

Query = Filter = F7

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

Banner 9

Search for a person or vendor

Banner 8
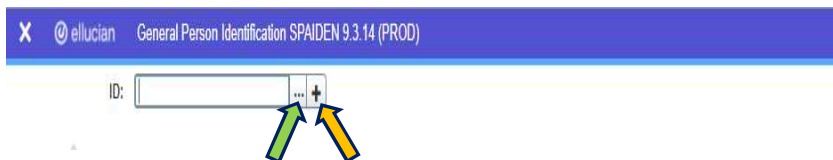
Banner 9

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

Enter as many criteria in the search field then click 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
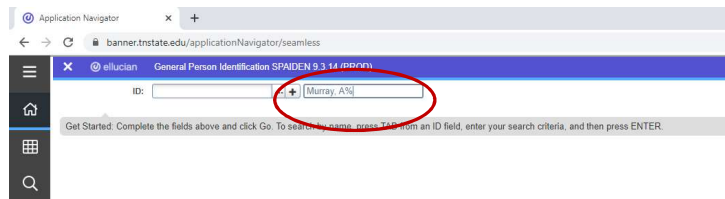
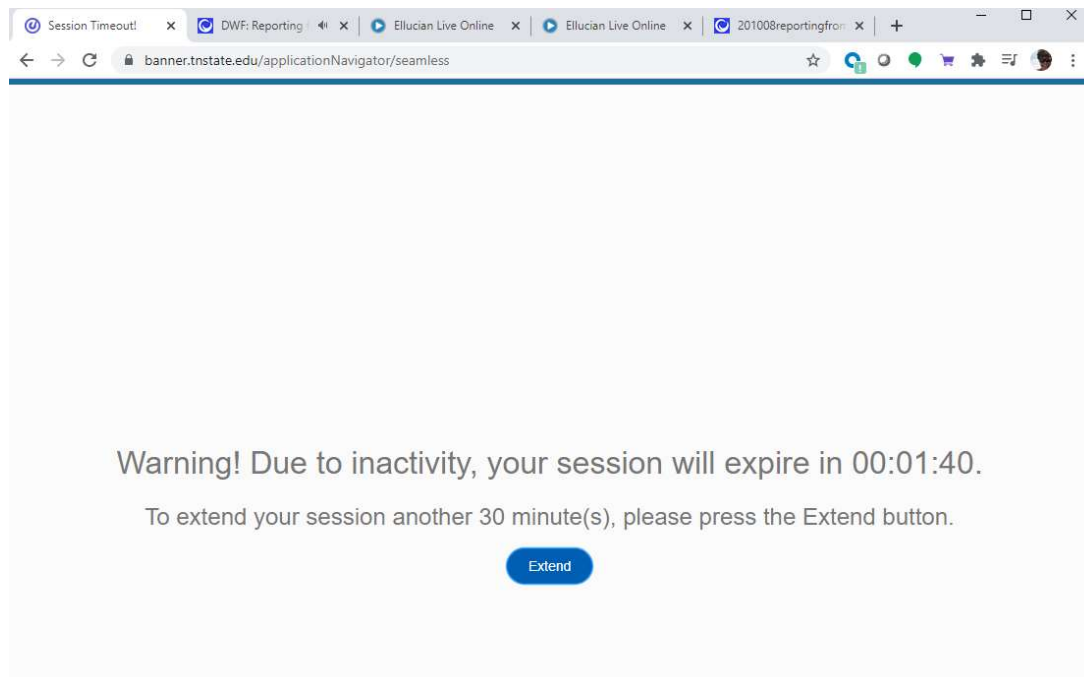This pop-up window allows you to see results

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=6Mqqy0lez_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/