Banner 9 Basic Navigation

OTS Applications Team

Before We Begin...

Purpose:

This session is an intro to Banner 9, basic Banner 9 navigation, and other Banner 9 functionality common to all modules. The approach is generic in order to assist a wide variety of users.

Reminders

- Everyone is muted during presentation.
- Please post questions in the chat.
- There will be a Q&A at the end of the session.
- This is the last live session. The recording will be posted.
- A PDF will be posted with the PowerPoint slides.

Agenda

- Finding Banner 9 Links and Information/Videos
- Banner 9's New Look and Benefits
- The Menu Bar
- Searching for Forms/Pages
- Next Block => GO
- RollBack => Start Over
- Options => Related or Tools
- Record Maintenance (Insert, Delete, Copy)
- Viewing Data
- Error Messages
- Query => Filter
- Searching
- Inactivity
- Other Resources

Finding Banner 9 Links and Information

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 realtime 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

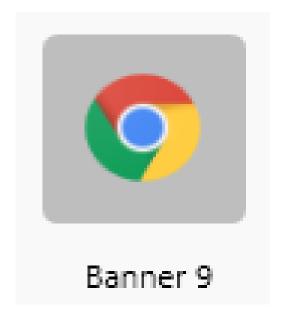
Self-Service Banner

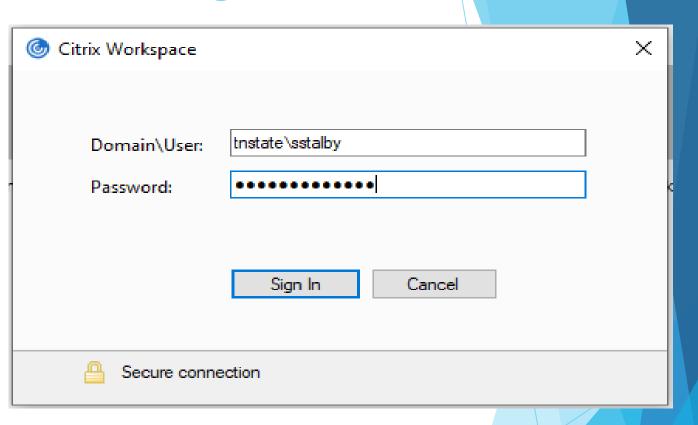
Accessing Banner 9 While Working Remote

Login to Citrix WorkspaceDomain\User: tnstate\<yourusername>Example: tnstate\jsmit301

Use the same login credentials as myTSU

2. Click the Banner 9 Icon





Banner 8 vs Banner 9 Keyboard Shortcuts

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

Visit the link below for the full list:

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

QUICK REFERENCE SHEET

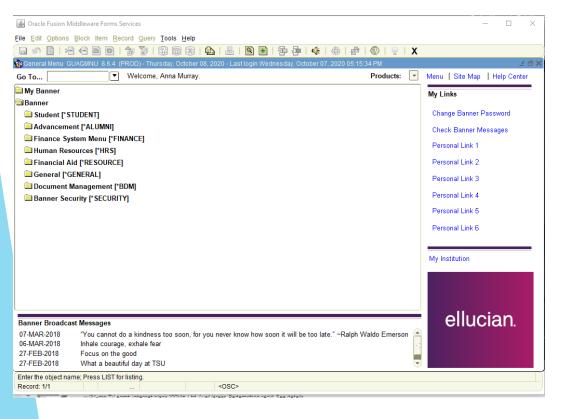
Actions with new or updated keyboard combinations in Banner 9 are indicated by bold entries

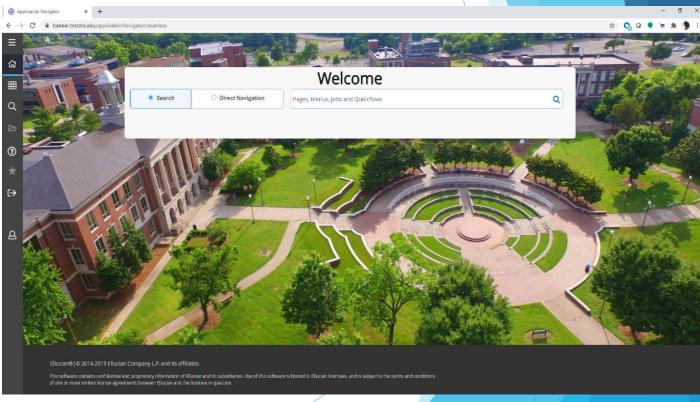
Action	Banner 8	Banner 9
APPLICATION NAVIGATOR		
Access Help		CTRL+M
Access Menu (My Banner Menu)		CTRL+Y
Display recently opened items		CTRL+SHIFT+L
Search		CTRL+SHIFT+Y
Sign out		CTRL+SHIFT+F
BANNER DOCUMENT MANAGEMENT (BDM)		
Add BDM Documents	Icon or Menu	ALT+A
Retrieve BDM Documents	Icon or Menu	ALT+R
Cancel Page, Close Current Page or	OTDI O	OTDI O
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	Not applicable	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
Delect on a Called Fage		
	Not applicable	CTRL+G
Toggle Multi/Single Records View Up/Previous Record		CTRL+G Up Arrow

Banner 9's New Look

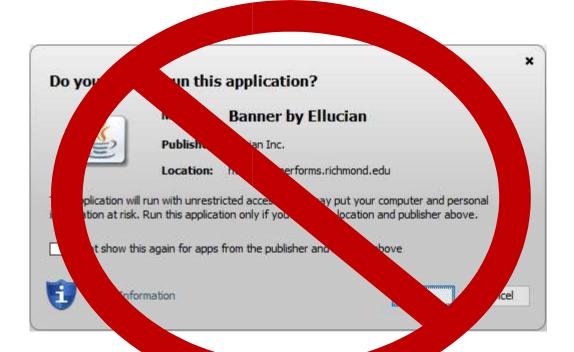
Banner 8 Home







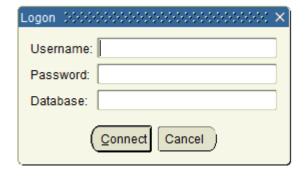
Huge Benefit of Banner 9: No More Java!

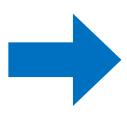


Benefit: No Banner-Specific Password

Just log in with your regular credentials (TNState Username and Password, the same one that you use to log onto your computer, Outlook, or myTSU)

Banner 8 Login





Banner 9 Login

	TENNESSEE STATE UNIVERSITY				
TNS	State Username				
am	urray4@tnstate.edu	Not you?			
Pas	sword				
ŀ					
	Continue				
	COVID Disclaimer Forgot Pa	ssword			

Benefit: Use any web browser!

Internet Explorer is no longer required.



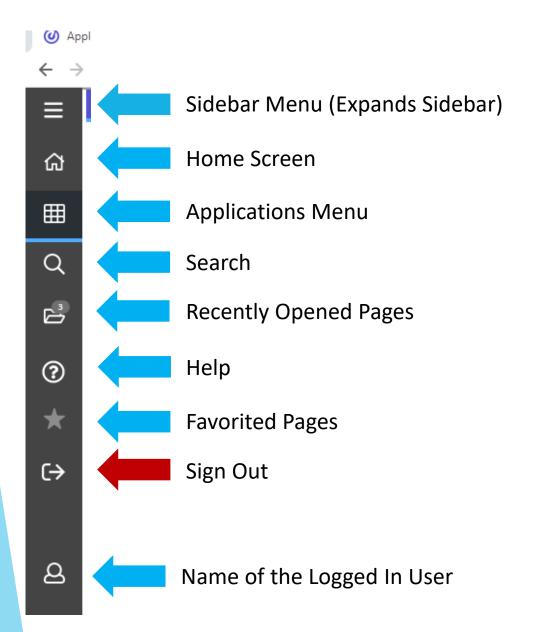
Key Terminology Changes

In banner 8	In Banner 9	
FORMS	PAGES	
BLOCKS	SECTIONS	
NEXT BLOCK	GO BUTTON	
ROLLBACK	START OVER	
QUERY	FILTER	

Shortcut Key changes

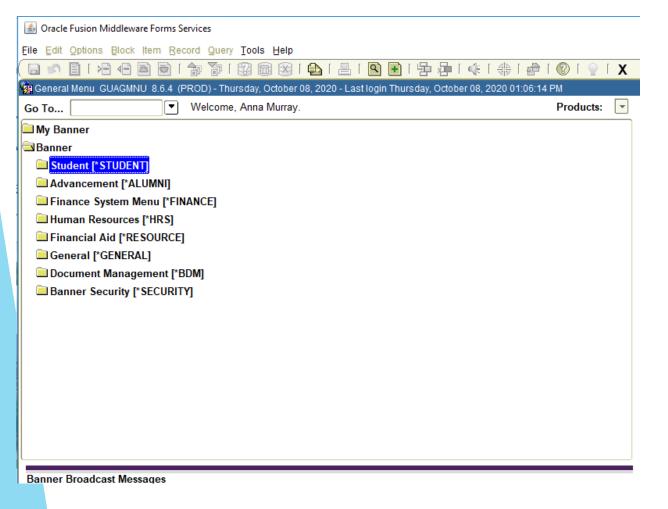
Banner 8		Banner 9	
	Shortcut Key		Shortcut Key
Next Block	Cnrl + PgDn	Next Section	Alt + PgDn
Previous Block	Cnrl + PgUp	Previous Section	Alt + PgUp
Rollback	Shift + F7	Start Over/Refresh	F5

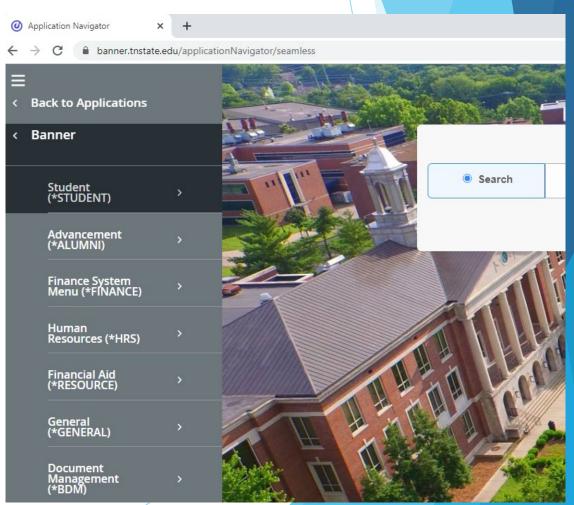
Banner 9 Menu Bar



Applications Menu

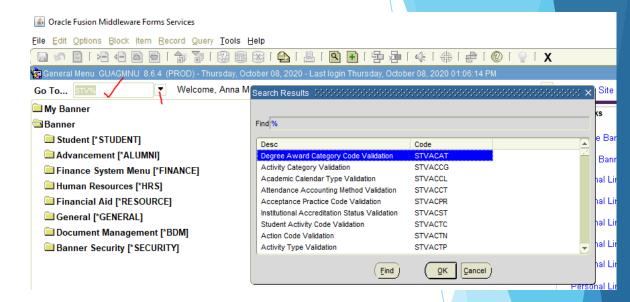
Banner 8

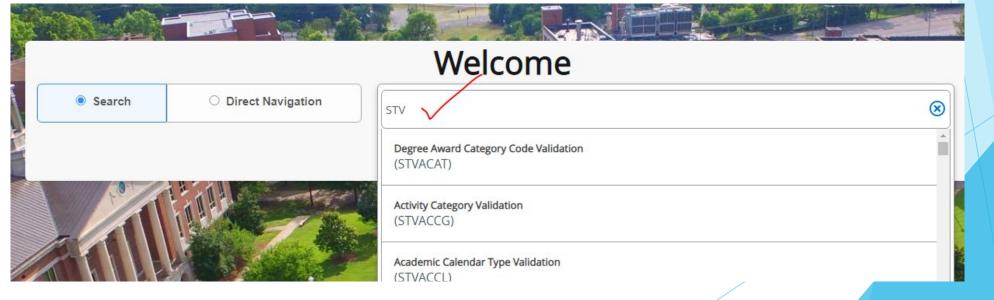




Searching for Forms/Pages % = Wildcard Character

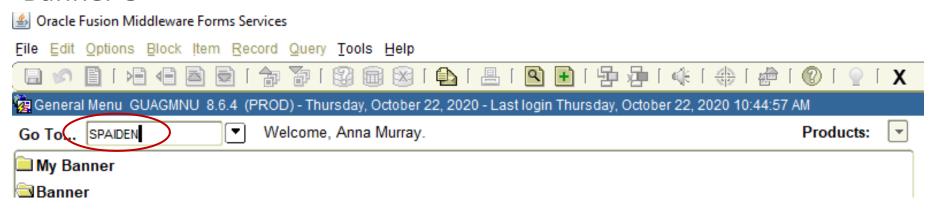
Banner 8

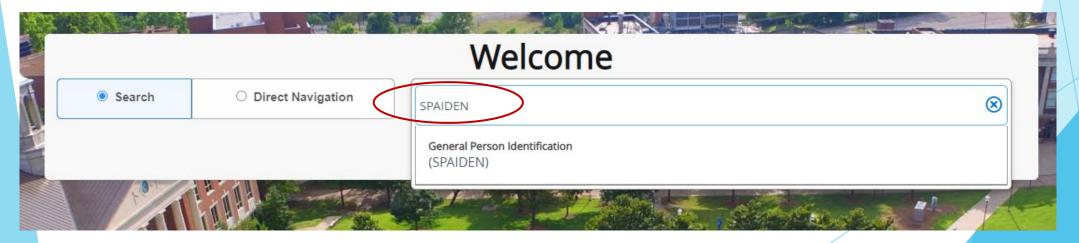




Directly Accessing Forms/Pages

Banner 8



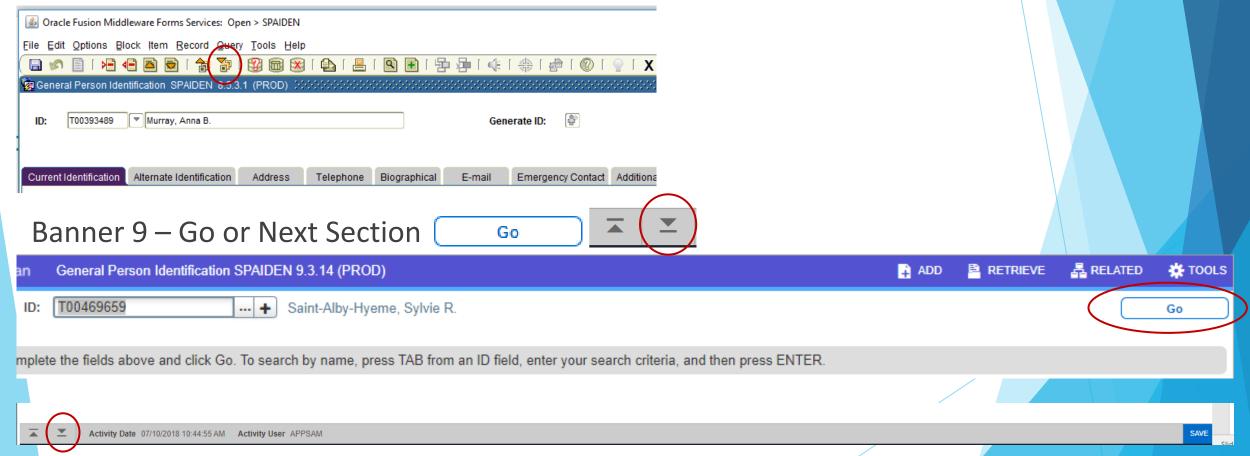


Next Block

Banner 9 - Use the Go Button Next Section - You can also use the Navigation Arrows or ALT + PgDn Keys

Banner 8 – Next Block

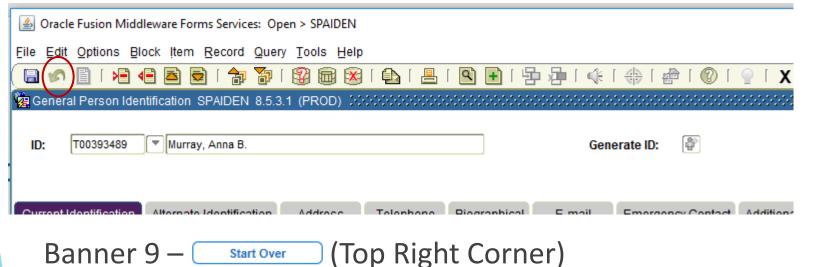


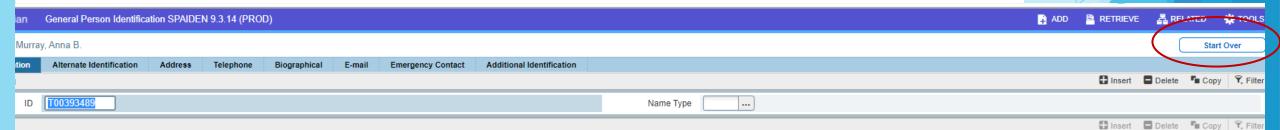


Rollback

Banner 9 - Click the 'Start Over' Button or the F5 Key

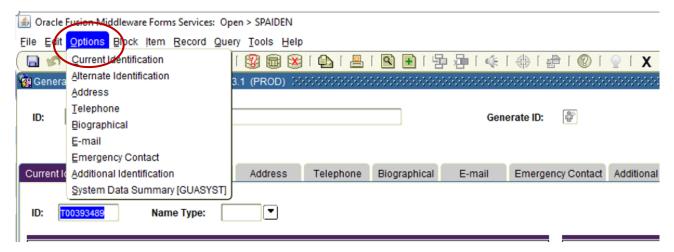




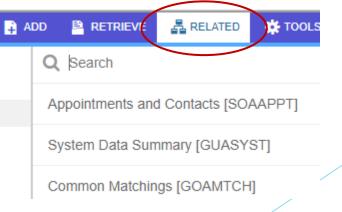


Options Menu (Banner 8) => Related Menu (Banner 9)

Banner 8

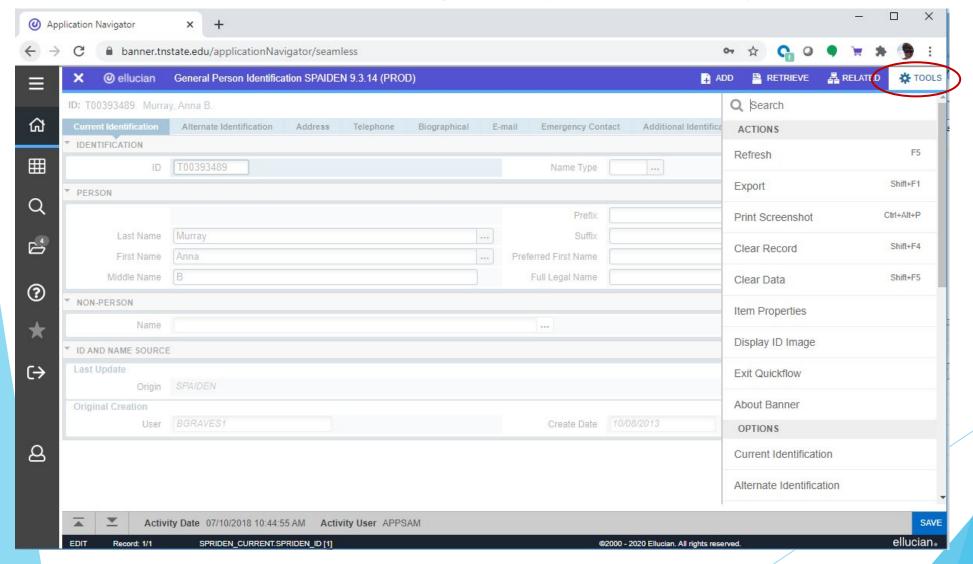


Banner 9 (Top Right Corner)



Tools (Top Right Corner)

Contains various utilities, including Print, Export, and Item Properties.



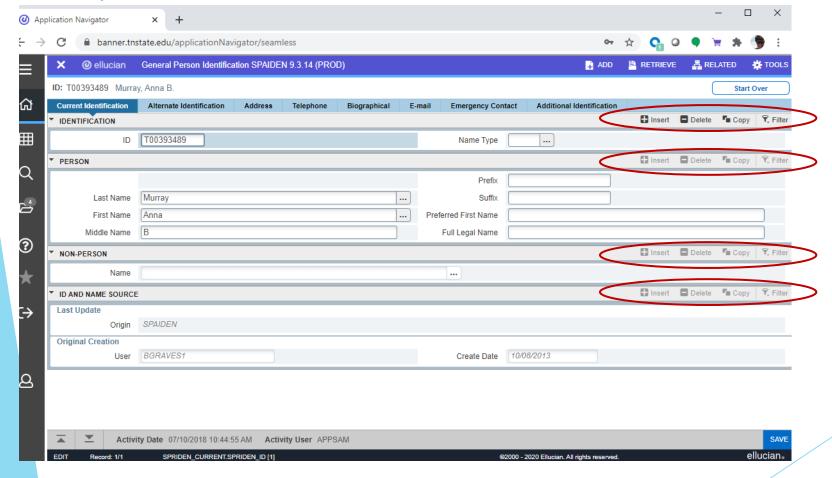
Record Maintenance

Record maintenance is accomplished using the buttons at the top of the section to be edited or added to. The Keyboard Shortcuts for record maintenance are unchanged.

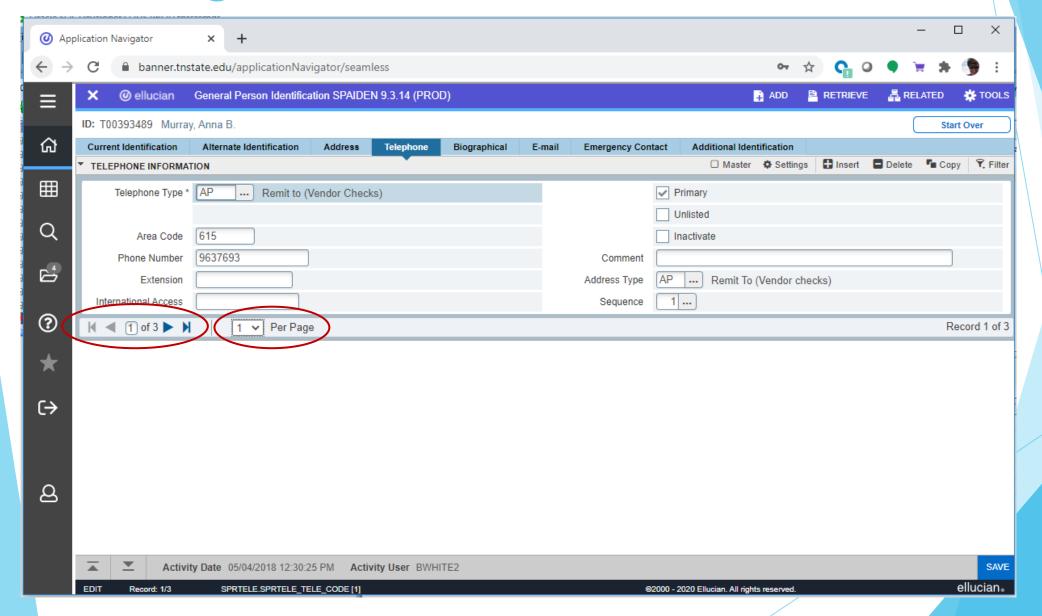
Insert Record = F6

Delete Record = SHIFT+F6

Duplicate Record = F4



Viewing Data



Message/Notification Types

Notifications will sometimes pop up at the top right of the screen.

You can click the yellow square, the notification hopper, to hide the message(s) or click the

square to open the hopper and display the message(s).

There are four notification types:

1. Error Notification - will display a "!" in a circle when message displayed



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

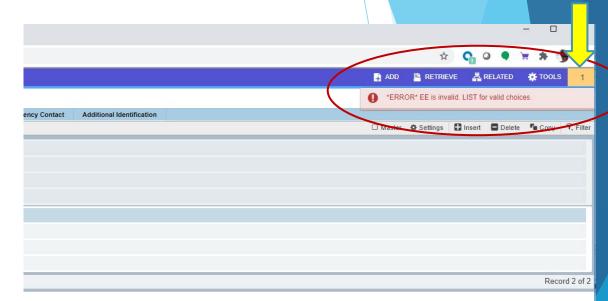


4. Success Notification - will display a checkmark in a circle when message displayed



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.





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Query => Filter

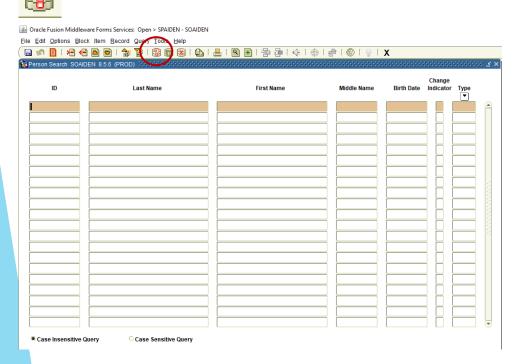
Filtering is the new way of limiting the results shown on the Form/Page.

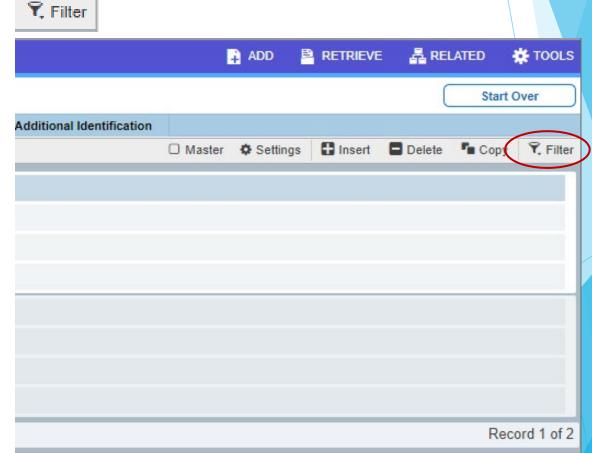
It works similarly to entering Query criteria in Banner 8.

In Banner 9 you specify the field and the value you're looking for and click Go to activate the filter.

Recall that the wildcard character (%) can be used here.

Banner 8



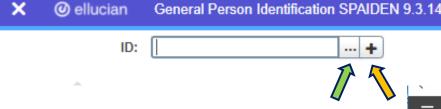


Searching/Adding a Person or Vendor

Banner 8

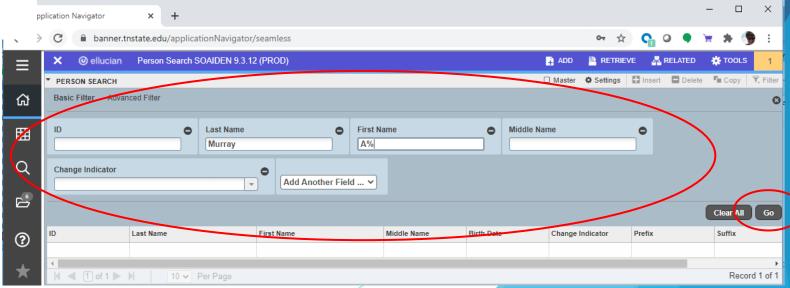


1. Click on the ellipsis (...) next to the field to initiate a search



2. Enter the desired criteria in the search field(s) then click Go.

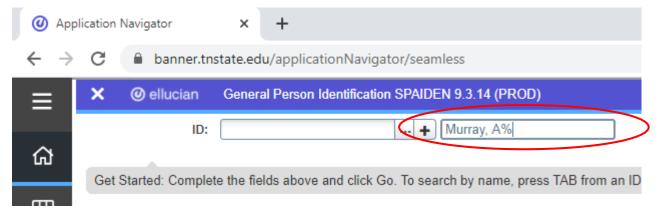
The buttons the yellow arrows point to are for adding a new record. When adding new records, please carefully check to be certain you're not creating a duplicate record.



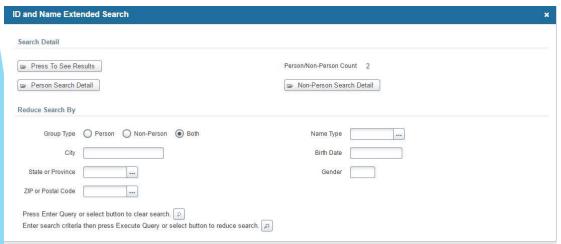
Searching/Adding a Person or Vendor

You can also press TAB when in the ID block to bring up a search entry field.

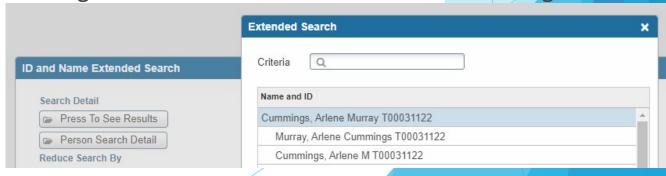
Pressing TAB brings up a search entry field:



After typing the search criteria, pressing enter will bring up further options (left).



Clicking "Press to See Results" shows the following:



Inactivity

As in Banner 8, you will be logged out of Banner 9 after 30 minutes of inactivity. In Banner 9, however, a warning message will now display after 25 minutes and give you the option to extend your session if you are still at your screen. Clicking 'Extend' will refresh your session for another 30 minutes of inactivity. You only see this screen if you are doing nothing in Banner for 25 minutes straight. It will not interrupt you during normal use of Banner 9.

Warning! Due to inactivity, your session will expire in 00:01:40.

To extend your session another 30 minute(s), please press the Extend button.



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 Access URL: https://banner.tnstate.edu/applicationNavigator
- ► Ellucian Banner 9 Intro Video: https://www.youtube.com/watch?v=6Mqqy0lez c
- For specific questions about a particular form or process please contact the appropriate office for assistance.
- If you discover something that does not work properly or get an unexpected error then please navigate to ServiceNow(SNOW), log in with your TNSTATE email 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/