

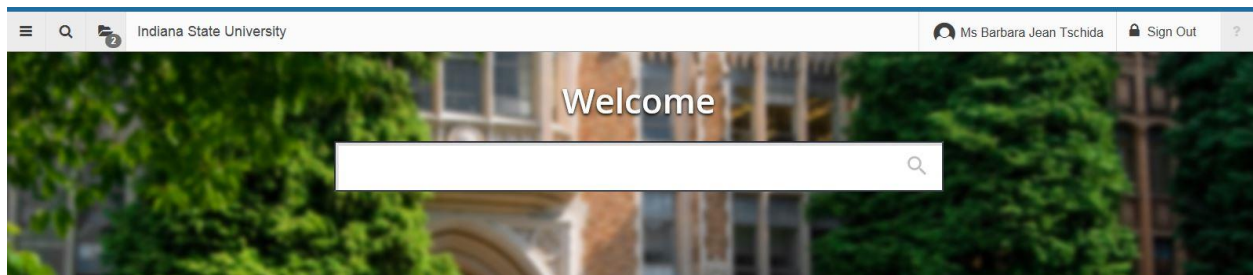
# Navigation Banner 9


Log into your portal and then select the Banner 9 badge.



This will bring you to the Application Navigator.

## Application Navigator: How to access Banner forms (now called pages.)



**Menu icon. (hamburger )** The Menu icon is located in the upper left corner of the application. Click on this icon to open the Banner Menu. Find the page you are interested in opening. Select the desired entry.



2

Indiana State University

< Banner

Student (\*STUDENT) >

Advancement (\*ALUMNI) >

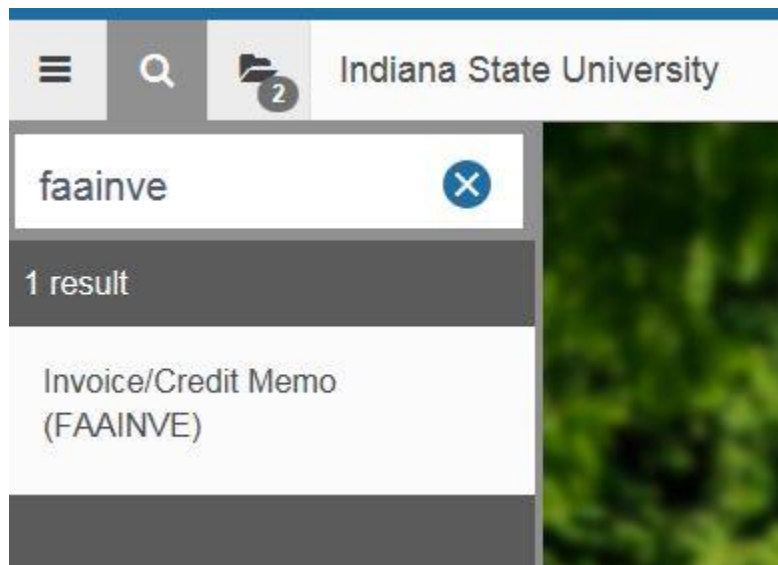
Finance System Menu (\*FINANCE) >

Human Resources (\*HRS) >

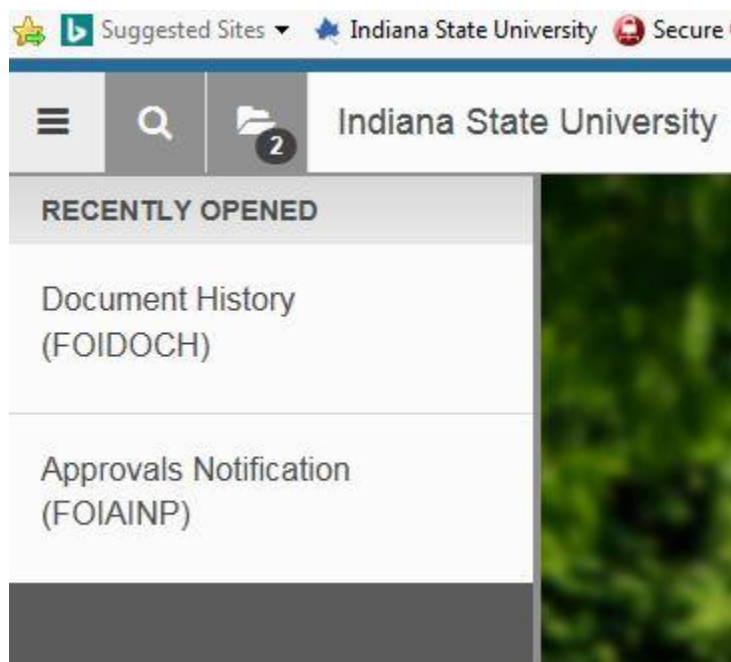
Financial Aid (\*RESOURCE) >

General (\*GENERAL) >

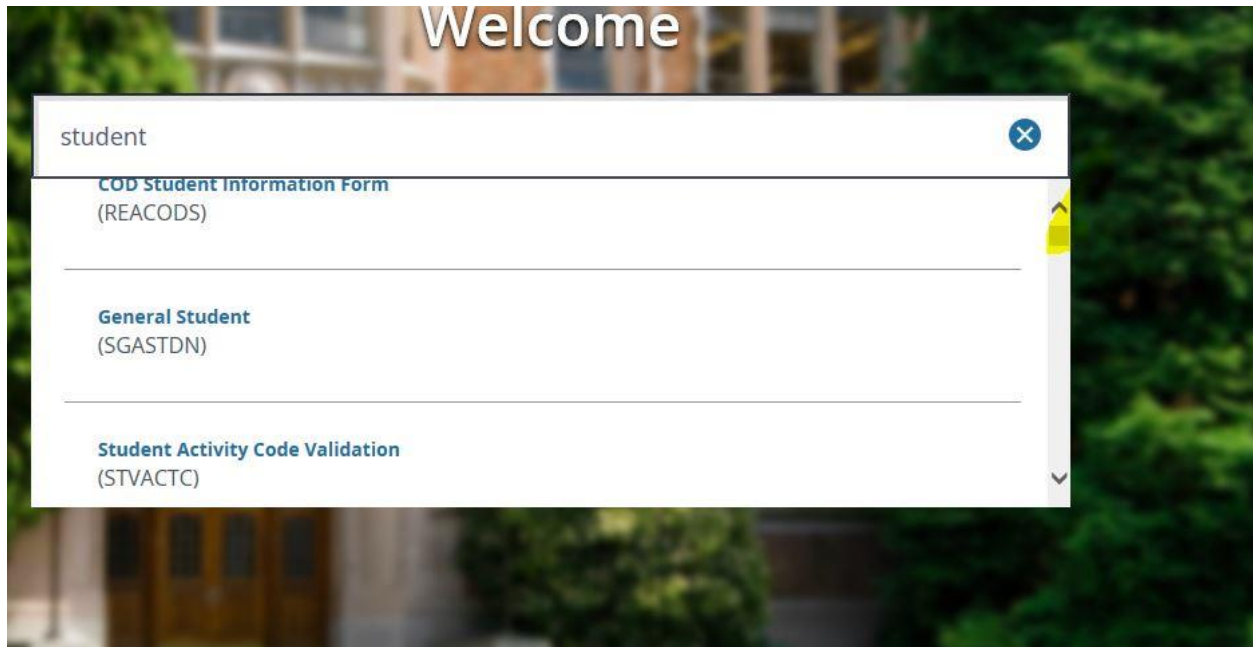
**Search icon.** The Search icon is located in the upper left, just to the right of the Menu icon. Click on this icon to open the Search window. You can then enter either the descriptive name of the page or the Banner acronym for the page. Once it brings up the desired information, click enter.



**Recently Opened icon.** The Recently Opened icon is located in the upper left, 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. Open the list and select a page to access it.



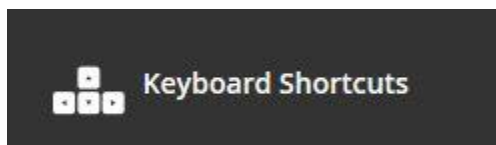
**Search box in the center of the page.** In this box, you enter either the descriptive name of the page or the Banner acronym for the page. Find the desired entry and click on it.



Clicking on the Home link (Indiana State University) will take you back to the navigation form.



Application Navigator has a set of keyboard shortcuts, which you can review by clicking on **Keyboard Shortcuts** in the bottom right corner of the page.



It is important to remember to use the **Sign Out** link 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.



## Basic Navigation

The basic navigation of each page includes the page header, notification center, key block, sections, and buttons.

A screenshot of the Ellucian University PPAIDEN 9.0 (GVUDB) application. The interface features a top navigation bar with the Ellucian University logo, a search bar, and user information for 'PLEICHLI' with a 'Sign Out' link. Below the navigation bar is a blue header for the 'Identification PPAIDEN 9.0 (GVUDB)' section, which includes 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons. The main content area displays a form for a user with ID '710000023' and name 'Dr. Gerald James LNPrefix Goodhart, test'. The form is organized into sections: 'CURRENT IDENTIFICATION' (with fields for ID, Name Type, SSN/SIN/TIN, and Amcas Name), 'PERSON' (with fields for Last Name Prefix, Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, Full Legal Name, and Marital Status), 'NON-PERSON' (with a Name field), and 'ID AND NAME SOURCE' (with fields for Last Update, Origin, and Original Creation). The bottom of the screen shows a status bar with 'EDIT', 'Record: 1/1', 'SPRIDEN\_CURRENT.SPRIDEN\_ID [1]', and a 'SAVE' button.

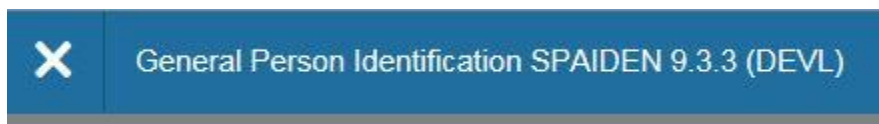
## Page header

The page header is part of the basic navigation.



The page header contains the following items:

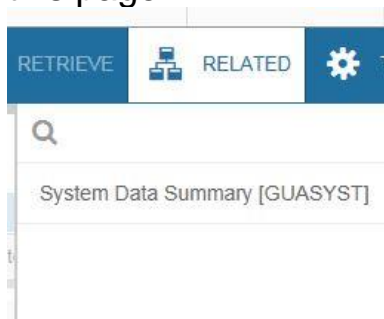
- Page close icon
- Page title



- **Add** and **Retrieve** icons, which are used with Banner Document Management. ISU does not use this feature.





- Related Menu, which displays a list of pages that can be accessed from this page.




- Tools Menu, which includes refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.

RETRIEVE

RELATED

TOOLS



ACTIONS

Refresh

F5

Export

Shift+F1

Print

Ctrl+P

Clear Record

Shift+F4

Clear Data

Shift+F5

Item Properties

Display ID Image

Exit Quickflow


About Banner

OPTIONS

Current Identification

Alternate Identification

Address

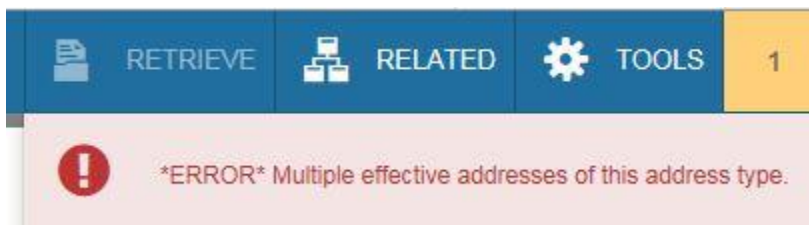


- Notification Center.

The Notification Center is located to the right of the **Tools** menu and displays the following types of information as needed:

- Successful save of data
- Warning messages
- Error messages
- Informational messages
- Number of messages to be corrected to continue in the page (in the example below, there is one error message)

You can click in the box with the number in the page header to open or close the Notification Center.



## Key block

The first block on most pages contains key information.

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 key block stays on the page as subsequent sections are displayed.

 A screenshot of a search interface. It includes a search bar with 'ID:' followed by a text input containing '991052133', a dropdown arrow, and a text input containing 'Tschida, Barbara J.'. To the right is a green 'Go' button. Below the search bar is a grey instruction bar that reads 'Get Started: Fill out the fields above and press Go.'

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.

The key block in the example below is where the id and name are located.

 A screenshot of a data entry form titled 'General Person Identification SPAIDEN 9.3.3 (CLNT)'. The form has a blue header with 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons. Below the header, the 'ID' field is populated with '991052133' and the 'Name' field with 'Tschida, Barbara J.'. The form is divided into sections: 'IDENTIFICATION' (with sub-sections: Current Identification, Alternate Identification, Address, Telephone, Biographical, E-mail, Emergency Contact, Additional Identification) and 'PERSON'. The 'IDENTIFICATION' section is currently active, showing fields for 'ID' and 'Name Type'. The 'PERSON' section shows a 'Prefix' field with 'Ms'.



To access the body of the page, populate the key block data and then click **Go**. (keyboard shortcut is Alt+Page down)

You can return to the key block if you are in the body of a page by clicking

**Start Over** in the upper right hand corner. (keyboard shortcut is F5)



## Sections

Pages are divided into sections 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.

A screenshot of a web-based data entry form. The top navigation bar includes tabs for "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", "Emergency Contact", and "Additional Identification". The "IDENTIFICATION" section is expanded, showing an "ID" field with the value "991052133" and a "Name Type" dropdown menu. Below this, the "PERSON" section is expanded, showing a "Prefix" dropdown menu with "Ms" selected. The form also includes "Insert", "Delete", "Copy", "More Information", and "Filter" buttons.

Each section contains related information.

A screenshot of a web-based data entry form showing four sections: "IDENTIFICATION", "PERSON", "NON-PERSON", and "ID AND NAME SOURCE". The "IDENTIFICATION" section has an "ID" field with the value "991". The "PERSON" section has fields for "Last Name" (Tsch), "First Name" (Barl), and "Middle Name" (Jea). The "NON-PERSON" section has a "Name" field. The "ID AND NAME SOURCE" section has a "Last Update" field. Each section is preceded by a black arrow icon.

They can be opened or collapsed by clicking on the arrow on the far left side of the section header.



Sections of data are accessed by using the scroll bar on the right side of the screen to scroll up and down the page.



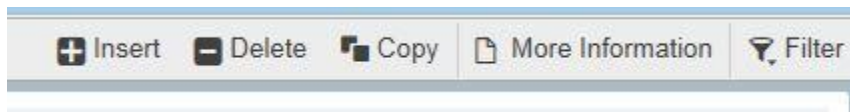
Some sections are accessed by using tabs that group information in a meaningful way.





If available, the sections can have a header that includes icons for the following actions:

- **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.
- **Filter.** Use this to filter records in the section.

**More Information:** If there is supplemental data for that record it will be found under the More Information button.



 More Information If the Button has a 'blank' page, there is not supplemental data for this record.

 More Information If the button has 'information' on the page, then there is supplemental data for this record.

If supplemental data cannot be entered for a section, the icon is not displayed.

Clicking on the **More Information** icon will bring up the Supplemental Data Window.

A screenshot of a software window titled "Supplemental Data SPAIDEN 9.3.3 (DEVL)". The window has a blue header bar with a close button. Below the header is a toolbar with "Insert", "Delete", "Copy", and "Filter" buttons. The main area contains a form with a table-like structure. The first row has a header "SUPPLEMENTAL DATA" and a "Comment" column. Below this are five rows of data entry fields. The first row is highlighted. The fields are: "Spouse first name", "Spouse middle name", "Spouse last name", "Show spouse Y/N", and "Display employee photo Y/N". At the bottom of the window is a footer bar with navigation controls (back, forward, first, last), a page indicator "1 of 1", a "Per Page" dropdown set to "10", and a "Record 1 of 5" indicator.

## Buttons

**Go** = Use the Go button to advance to the body of the page after populating the key block.

**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 button to navigate to the next section of data. Use the Previous Section button to navigate to the previous section of data. The Next Section and Previous Section buttons are located at the bottom left of each page. If your page has tabs at the top, this serves the same function.



**Start Over** = Use the Start Over button to return to the key block of the page.

## Required fields

An asterisk (\*) displayed next to a field name indicates that the field requires a value before you continue on the page.

Document : \* [N]

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, you can sort the values by clicking on the column headings (field label). 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.

|                     |
|---------------------|
| Title               |
| ADVERTISING EXPENSE |


## Dates

Dates can be entered by data entry or the calendar icon. For data entry purposed a 'T' can be used to input today's date. The date field will not allow you to enter just 20, you must use a mmddyy (121717) format for data entry.)

|            |    |    |      |    |    |    |   |
|------------|----|----|------|----|----|----|---|
| 09/27/2017 |    |    |      |    |    |    |  |
| Today      |    |    |      |    |    |    |   |
| September  |    |    | 2017 |    |    |    |   |
| Su         | Mo | Tu | We   | Th | Fr | Sa |   |
| 27         | 28 | 29 | 30   | 31 | 1  | 2  |   |
| 3          | 4  | 5  | 6    | 7  | 8  | 9  |   |
| 10         | 11 | 12 | 13   | 14 | 15 | 16 |   |
| 17         | 18 | 19 | 20   | 21 | 22 | 23 |   |
| 24         | 25 | 26 | 27   | 28 | 29 | 30 |   |

## Lookup

The Lookup feature allows you to quickly look up a value for a field.

The **Lookup** button  next to a field indicates that the field has the Lookup feature. Click the **Lookup** button, enter a filter value, and press **Enter** to display results that match the filter criteria. Select a value and click **OK**, or double-click a value to return the value to the calling page.

## Address Type Validation (STVATYP)



Criteria

| Code | Desc                        | Sys Req | Tele Code | Activity Date |
|------|-----------------------------|---------|-----------|---------------|
| AO   | AP Overflow                 | N       |           | 01/26/2007    |
| AP   | Accounts Payable            |         | AP        | 09/15/1994    |
| BB   | Bursar Business Billing     |         | BB        | 09/08/1994    |
| BI   | System required do not use  | Y       | BI        | 12/08/1997    |
| BU   | Alumni Business Address     | Y       | BU        | 09/08/1994    |
| CA   | Campus address -- employees |         | CA        | 09/16/1994    |
| DP   | Diploma                     |         | DP        | 06/01/1994    |
| DV   | Development                 | N       | MA        | 11/13/1996    |
| EE   | E-Mail                      | N       |           | 01/22/1998    |
| EM   | Emergency                   |         | EM        | 04/29/1987    |

Navigation: 1 of 2 | 20 Per Page | Record 1 of 31

Cancel

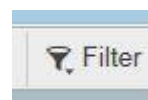
OK

## 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.

### Procedure

1. Click the active **Filter** icon for the section.



2. Choose the field you want to filter from the **Add Another Field** drop-down list.



3. Choose an operator from the **Contains** drop-down list. The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other). 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.
4. Enter a value for the field that you selected.
5. **Optional:** If you want to add another field to the filter criteria, choose a field from the **Add Another Field** field, select an operator, and enter a value for the field that you selected. Repeat this step until all filter criteria are entered.
6. When all filter criteria are entered, click **Go** 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.
7. **Optional:** If you want to perform another filter, click **Filter Again**.
8. **Optional:** If you want to close the filter and display all unfiltered records, click the lowercase X in the upper right corner of the filter window to close the filter.

**Help**

Application Navigator provides online help for pages. Click on the question mark in the Application Navigator header to open the help for the page in context. You can perform various actions in the help suite For example, you can search for topics or print the information.



Your pop up blocker may need to be disabled to use this feature.

## Multiple records

### Moving between multiple records

Data can exist in multiple records of the same type in the database, for a record (example: addresses)

Records can be viewed two different ways:

- **One record at a time.** In this instance, the details of the data are not displayed in a table grid, but rather in a more easily readable manner. You can move from record to record using pagination controls at the bottom of the record.

A screenshot of a web form for address details. The form has the following fields: 'Street Line 3' (empty), 'City' (filled with 'terre haute'), 'State or Province' (a dropdown menu showing 'IN' and 'Indiana'), 'ZIP or Postal Code' (filled with '47802'), and 'County' (empty). At the bottom of the form, there are pagination controls: a set of navigation arrows, a box showing '1 of 17', and a 'Per Page' dropdown menu set to '1'.



- **In a grid.** In this instance the data is presented in column and row format. You may need to scroll to view all the data. You can page through the records using the pagination controls at the bottom of the list. You can decide how many records you want to review in the grid, and sort the data in ascending or descending order by clicking on the headers.

| X Electronic Approval Category Code Validation NTVACAT 9.3.3 (DEVL) |                                |   |
|---|--------------------------------|---|
| ELECTRONIC APPROVAL CATEGORY CODE VALIDATION                        |                                |   |
| Approval Category Code *  | Description *                  | Self-Service Description                          |
| B1SFCP  | Non Exempt - Posn Number Chg   | Non Exempt - Change with new position number      |
| B1SFDR  | Non Exempt - Reorganization    | Non Exempt - Reorganization                       |
| B1SFEJ  | Non Exempt - Job Assign End    | Non Exempt - Job Assignment Ended                 |
| B1SFGR  | Non Exempt - Grant Renewal     | Non Exempt - Grant Renewal                        |
| B1SFJC  | Non Exempt - Job Change        | Non Exempt - Change without new position number   |
| B1SFLD  | Non Exempt - Labor Change      | Non Exempt - Labor Distribution Change            |
| B1SFLP  | Non Exempt - Leave With Pay    | Non Exempt - Leave With Pay                       |
| B1SFLW  | Non Exempt - Leave Without Pay | Non Exempt - Leave Without Pay                    |
| B1SFNW  | Non Exempt - Non Working       | Non Exempt - Non Working Period                   |
| B1SFRA  | Non Exempt - Reappointment     | Non Exempt - Reappointment                        |
| B1SFRI  | Non Exempt - Reinstatement     | Non Exempt - Reinstatement                        |
| B1SFRL  | Non Exempt - Return from Leave | Non Exempt - Return from Leave                    |
| B1SFRT  | Non Exempt - Retirement        | Non Exempt - Retirement                           |
| B1SFSP  | Non Exempt - Staff Separation  | Non Exempt - Separation from University           |
| B1SFSU  | Non Exempt - Suspension        | Non Exempt - Suspension                           |
| B1SFTA  | Non Exempt - Temp Reappt       | Non Exempt - Temporary Reappointment with End Dat |
| B1TPGR  | Non Exempt Temp - Grnt Renew   | Non Exempt Temporary - Grant Renewal              |
| B1TPSP  | Non Exempt Temp - Separation   | Non Exempt Temporary - Separation from University |
| BUDGET  | Budget Employees               |   |
| DEPTHD  | Department Management          |   |
| 1 of 5   20 Per Page  |                                |   |

## Data export

You can export data from a transformed Banner page to an Excel spreadsheet (.xls) by clicking **Tools > Export**.

## Keyboard shortcuts

Tab= move cursor to the next field

Shift+Tab = move cursor to a previous field

previous record = Up arrow  
next record = Down arrow

Previous record = Page up  
Next record = Page down

First page = Ctrl + Home (first record)  
Last page = Ctrl + End (last record)

Cancel form, Exit, Close current page, Cancel search or query = Ctrl + Q

Save = F10

Record remove (delete record) = Shift + F6  
Insert/Create Record = F6

Next Section = Alt + Page down  
Previous Section = Alt + Page up

Clear Page/Start over = F5

Search/Open Filter Query = F7 (enter query)  
Execute Filter Query = F8 (execute query)

Export = Shift + F1  
Print = Ctrl + P  
Refresh/Rollback = F5

Record remove – Shift+F6

Next Block = ALT+ Page Down  
Previous Block = Alt + Page Up

## How to make Banner bigger

Increase = CTRL+  
Decrease CTRL-  
Return to normal = CTRL0

## Terminology Changes

Forms = Pages

From Key Block, Next Block = Go

Blocks = Sections

Page Down & Page Up



Rollback = Start Over

Query = Filter

