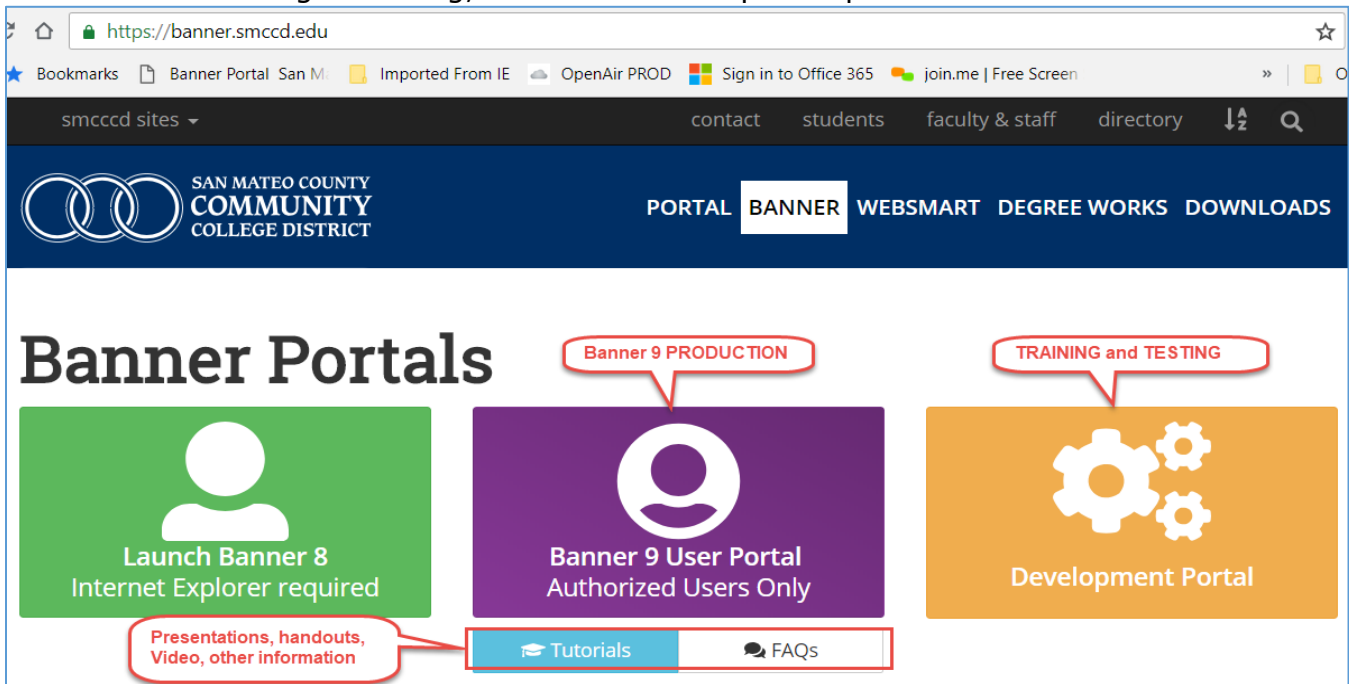


San Mateo Community College District
BANNER 9 NAVIGATION
October 3, 2018

SIGNING into BANNER 9 Application Navigator:

1. Browser Considerations:
 - a. Banner 9 will run on Chrome, Internet Explorer, Firefox, and Safari. You are able to have multiple tabs or browsers open.
 - b. Banner 8 can still be accessed through the regular menu using Internet Explorer.
2. **SIGNING into BANNER** – from “<https://banner.smccd.edu/>” select the “Banner 9 User Portal. If training or testing, select the Development portal.



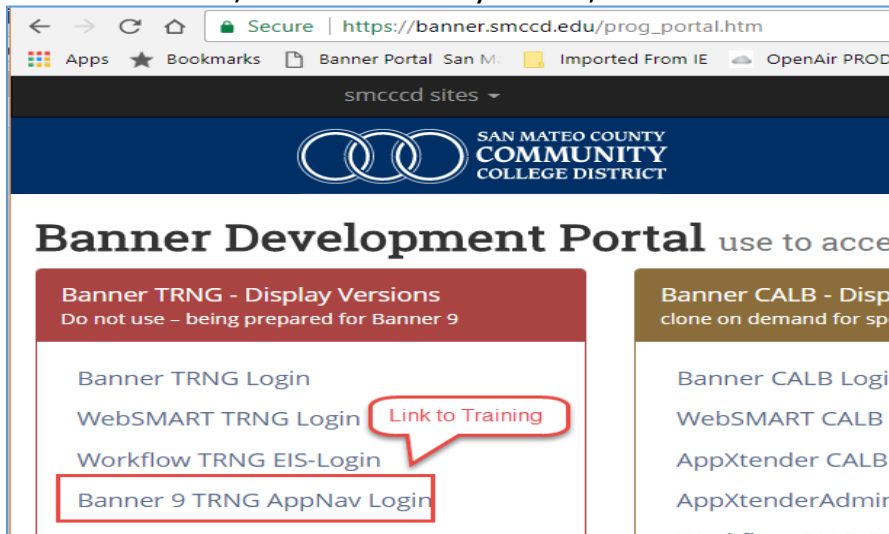
3. **Sign in** uses your employee email (AD) username and password (username@smccd.edu).

Use your SMCCCD **email username** and **password** to login.
Example: **jd0e172** — do not include '@smccd.edu'.

Remember me on this computer

[Forgot Password?](#)

Note: For training, go to the Banner Development Portal, http://banner.smccd.edu/prog_portal.htm. For Student system training, use the DEVL instance, for all other systems, use the Banner TRNG.



TRANSFORMED FORMS are the Banner forms, redeveloped using java-based tools instead of Oracle Forms.

1. All baseline Banner 8 forms have been “tranformed” into an equivalent Banner 9 “page” with the same name, description and functionality.
2. Responsive design – responds to the screen size.
3. Runs on Chrome, Internet Explorer, Firefox, and Safari. Chrome is recommended.

4. **Banner 9 Changes to Terminology**

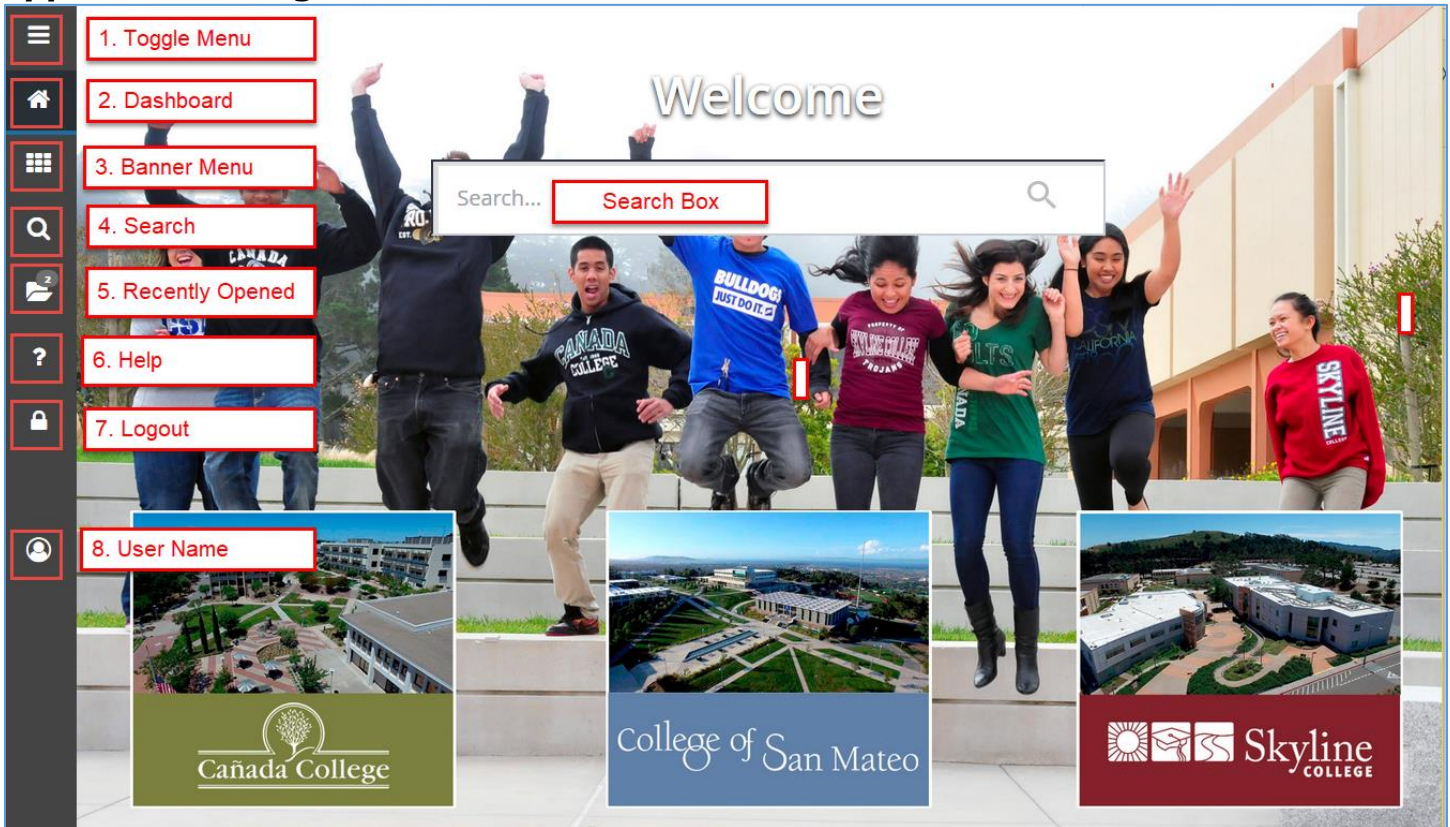
Banner 8	Banner 9
Forms	Pages
Blocks	Sections
Next Block	GO Button
Rollback	Start Over
Query	Filter

5. **Banner 9 changes to Common Shortcut Keys**

Command	Banner 8	Banner 9
Next Block	PgDn	ALT+PgDn
Previous Block	PgUp	ALT+PgUp
Record insert	CTRL+F2	F6
Record Remove	CTRL+F3	SHIFT + F6
Record Duplicate	F7	F4
Filter (Enter/Execute Query)	F9 and F10	F7
List of Values	CTRL+L	F9
Open New Form	CTRL+B	CTRL+SHIFT+Y
Save	F12	F10

B. **APPLICATION NAVIGATOR** "AppNav" is the home page that enables institutions to go between Banner 9 pages.

Application Navigator Dashboard

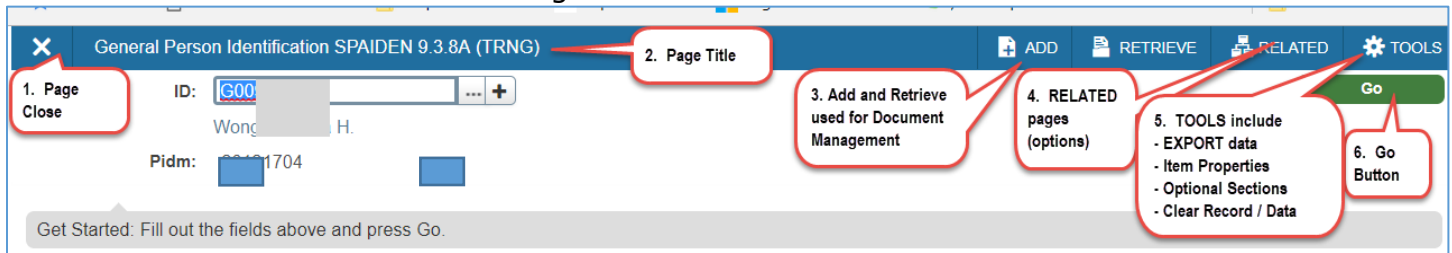


Banner 9 Tool Menu

1. **Toggle Menu** expands and contracts the menu column. Banner menus open in a cascade by functional area. Find the page you are interested in opening and click. If you have set up a "My Banner" menu, that will also appear.
2. **Dashboard** (CTRL+SHIFT+X) is also Home or the Welcome page. It can be used from any page to return to the AppNav Dashboard/home page.
3. **Applications** (CTRL+M) opens the Banner menus by functional area. Find the page you are interested in opening and click.
4. **Search icon** (CTRL+SHIFT+Y) is used to search for an administrative page by entering either the Banner Acronym or the descriptive name of the page.
5. **Recently Opened icon** (CTRL+Y) displays with a count of pages after you have opened the first page. Open the list and select a page to access it.
6. **Help Icon** (CTRL+SHIFT+L) can be selected from a functional page, selecting this icon will open the help information. Help is not available from the Home Page.
7. **Sign Out** (CTRL+SHIFT+F) link in the Application Navigation Toolbar will exit you from your Banner portal applications.
8. **Banner User Name** displays name of the person logged into this account.

Search Box on the "Welcome Page" lets you enter either the descriptive name of the page or the Banner acronym for the page.

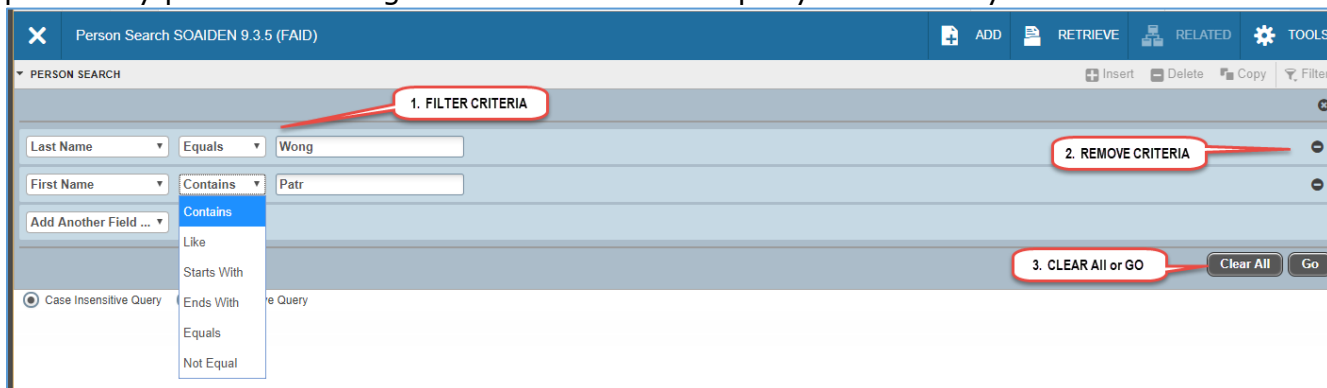
PAGE HEADER contains the following items:



1. **Page close** (CTRL+Q) icon.
2. **Page title**
3. **ADD** (ALT+A) and **RETRIEVE** (ALT+R) icons are used with Banner Document Management.
4. **RELATED** (ALT+SHIFT+R) button displays a list of pages that can be accessed from this page like the Options Menu in Banner 8.
5. **TOOLS** (ALT+SHIFT+T) button includes refresh, export, print, clear data, item properties, display ID image, and other options controlled by the page.
 - a. **Refresh** (F5)
 - b. **Export** (SHIFT+F1)
 - c. **Print** (CTRL+P)
 - d. **Clear Record** (SHIFT+F4)
 - e. **Clear Data** (SHIFT+F5)
6. **GO** (Alt+PgDn) to access the body of the page, populate the key block data and then click **Go**.

Note: Workflow Release and Submit buttons also display in the page header.

FILTERS (F7) provide the ability to search for specific records by querying on data element, previously provided through search and execute query functionality.



1. **Filter Criteria** provides the ability to select based upon field, function, and criteria.
2. **Remove** button are used to remove a single criteria record.
3. **Clear all** (F7) to clear results and return to filter or **GO** (F8) to execute query.
4. **Basic versus Advanced Filtering** – New functionality with the October upgrade:
 - a. Basic Filtering is the default and includes frequently-used fields with "Equal" as the function.
 - b. Advanced filtering includes all of the filter fields and criteria options.

Other buttons include:

- **FILTER AGAIN** (F7)
- **CANCEL** (CTRL+Q)
- **SELECT** (ALT+S)

SECTIONS of the form will display after the key data has been entered and the **GO** button has been pressed.

The screenshot shows a web-based form interface for Banner 9. At the top, there are tabs for 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', 'Emergency Contact', and 'Additional Identification'. Below these are sections for 'IDENTIFICATION', 'PERSON', and 'NON-PERSON'. The 'PERSON' section contains fields for 'Last Name' (Wong), 'First Name' (Patricia), 'Middle Name' (Huie), 'Prefix', 'Suffix', 'Preferred First Name' (Paddy), and 'Full Legal Name' (Patricia Huie Wong). Action icons for 'Insert', 'Delete', and 'Copy' are visible above the 'PERSON' section. A 'Filter' icon is also present. A 'Start Over' button is located in the top right corner. The interface includes a notification center and numbered tabs for navigation.

1. **Open or Collapse** a section using the arrow on the far left side of the section header.
2. **Tabs** (CTRL+SHIFT+1, CTRL+SHIFT+2, etc.. using number represents the tab sequence) are available on some pages to access sections of grouped information.
3. **Notification Center** displays messages including errors.
4. **Start Over** (Alt+PgUp) returns to the key block.
5. **Insert-Delete-Copy record icons** for the following actions:
 - a. **Insert** (F6) Use this to insert records in the section.
 - b. **Delete** (SHIFT+F6) Use this to delete records in the section.
 - c. **Copy**. (F3 or F4 to duplicate selected record in the section.)
6. **Filtering (F7)** is used to limit and identify records based upon search criteria. See the section below on Filtering.

PAGE FOOTER includes the following:

The screenshot shows the footer of the Banner 9 Transformed Forms interface. It includes navigation arrows for 'Previous and Next Section', 'Activity Date' (03/01/2011 08:43:09 AM), 'Activity User' (WONGP), a 'SAVE' button, and a status bar showing 'EDIT Record: 1/1 SPRIDEN_CURRENT.SPRIDEN_ID [1]' and the 'ellucian' logo.

1. **NEXT** (ALT+PgDn) and **PREVIOUS** (ALT+PgUp) sections move up and down between sections and tabs.
2. Last Activity Date and User (if information is collected on the page/form.)
3. **SAVE** (F10) button
4. Additional information including:
 - a. **MODE** identifies edit (update) versus query mode.
 - b. **Record Number** identifies record number and total records.
 - c. **Data Field Name** identifies the Banner table and data field.

DATA in GRID MODE

Account Detail Review Form - Student TSAAREV 9.3.6A (DEVL)

ID: G008 Credit Limit: User: WONGP Holds: Start Over

ACCOUNT DETAILS

3. Sort by Column Heading

Detail Code *	Description *	Term *	Charge	Payment	Balance	Payment ID	Source *	Effective Date *	Transaction Date
EF02	Enrollment Fee Skyline	201808	138.00		138.00		R	09/18/2018	09/18/2018
MFM3	Mat'l's Fee CAN Multimedia	201808	4.00		4.00		R	10/18/2018	10/18/2018
EF03	Enrollment Fee Canada	201808	69.00		69.00		R	10/18/2018	10/18/2018
MFM3	Mat'l's Fee CAN Multimedia	201808	-4.00		-4.00		R	08/28/2018	08/28/2018
EF03	Enrollment Fee Canada	201808	-69.00		-69.00		R	08/28/2018	08/28/2018
MFM3	Mat'l's Fee CAN Multimedia	201808	4.00		4.00		R	08/28/2018	08/28/2018
EF03	Enrollment Fee Canada	201808	69.00		69.00		R	08/28/2018	08/28/2018
EF02	Enrollment Fee Skyline	201808	-138.00		-138.00		R	08/21/2018	08/21/2018
EF02	Enrollment Fee Skyline	201808	138.00		138.00		R	08/29/2018	08/29/2018
EF02	Enrollment Fee Skyline	201808	138.00		138.00		R	08/13/2018	08/13/2018

1. Page count and records per page

2. Total number of records

BALANCE DETAILS

Query Balance 4,191.00

Account Balance 4,191.00

Amount Due 4,118.00

Authorized Aid Balance

NSF 0

Schedule-Bill Term

Print Schedule-Bill



Activity User WONGP

Record: 1/88 TBRACCD.TBRACCD_DETAIL_CODE [1]

ellucian

1. **Page Count** indicates the number of total pages. **Records per Page** manage the number of records displayed.
2. **Record Count** indicates the record highlighted as a count within the total number of records.
3. **Sort Order** – in Grid mode, click on header name.
4. Record data can continue to a section below or require scrolling to the right.
5. Columns can be re-arranged by drag and drop. Changes are not saved.

OTHER BASIC NAVIGATION HINTS

1. Functionally, things are the same. The sooner you begin using it, the more comfortable you become.
2. Link to set up your Password Manager reset: <https://adselfservice.smccd.edu>. You must register before you need it.
3. Asterisk "*" indicates a required field.
4. Dates can be identified by calendar pop-up. "T" can also be entered to default in today's date.
5. Name search can be performed by tabbing through the blank ID field. A box will pop up where a name can be entered in last, first name format. If not found, other options are presented.
6. "... " next to a field will bring up the drop-down list of values.
7. Multiple Records are identified by the record count in page footer.
8.  **Single** and  **Multiple** record icons will show before the "Insert" icon on administrative pages that display in grid mode with multiple records or a single record at a time.
9. Quickflows are executed from the page, "GUAQFLW". At this time launching a Quick Flow directly from the search bar is giving inconsistent results.
10. Banner 8 INB – Open Banner 8 forms from in a separate Internet Explorer tab.
11. GUAPMNU is used to set up "My Banner".
12. CTRL+ and CTRL- are the zoom-out and zoom in hotkeys in windows.
13. Banner 9 does not support typing ahead.
14. If something is not behaving correctly, clear the browser cache.

KEYBOARD SHORTCUTS

ACTION	Banner 8	Banner 9
Choose / Submit	ENTER	ENTER
Clear record	F3	SHIFT+F4
Clear records (all in a section)		SHIFT+F5
Delete Record	CTRL+F3	SHIFT+F6
Down or Next Record	Down Arrow	Down Arrow
Duplicate selected record	F7	F4
Exit Current Page or Exit Search	CTRL+Q	CTRL+Q
Export Data		SHIFT+F1
Filtering (enter/execute query)	F9, F10	F7
First Record		CTRL+Home
Help		CTRL+SHIFT+L
Insert/Create Record	CTRL+F2	F6
Last Record		CTRL+End
Lookup or List of Values (LOV)	CTRL+L	F9
Next Field or Item	Tab	Tab
Next Page Down (where multiple records per page)	F8	Page Down
Next Section	Page Down	ALT+Page Down
Open Menu Directly		CTRL+M
Open Related Menu		ALT+SHIFT+R
Open Tools Menu		ALT+SHIFT+T
1 st Tab 2 nd Tab and so on		CTRL+SHIFT+1 CTRL+SHIFT+2
Previous Field or Item	SHIFT+TAB or F6	SHIFT + TAB
Previous Section	Page Up	ALT+Page Up
Print	CTRL+P	CTRL+P
Save	F12	F10
Select record on a Called Page	double-click	double-click or ALT+S
Start Over or Rollback	F5	F5
Toggle Multi/Single Records View		CTRL+G
Up/Previous record	Up Arrow	Up Arrow
Application Navigator		
AppNav - Access Help		CTRL+SHIFT+L
AppNav - Access Menu		CTRL+M
AppNav - Recently Opened pages		SHIFT+Y
AppNav - Search	CTRL+B	CTRL+SHIFT+Y
AppNav - Sign Out		CTRL+SHIFT+F
Banner Document Management		
Add BDM Documents		ALT+A
Retrieve BDM Documents		ALT+R