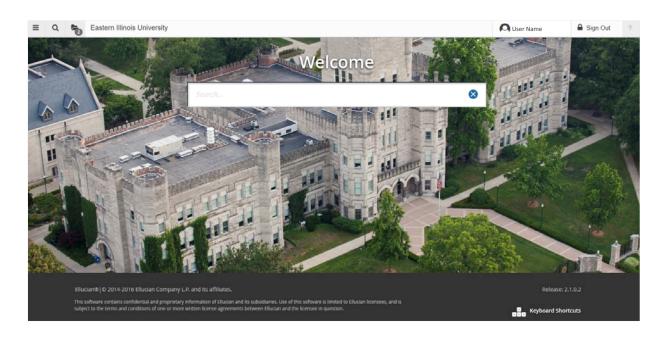
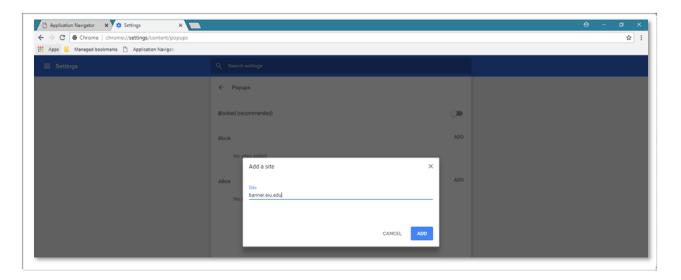
# **BANNER 9 - NAVIGATION GUIDE**

# **EIU Adaptation of Ellucian Guide**



\* Please note that, while Banner 9 supports all current browsers, EIU's Information Technology Services (ITS) recommends using Google Chrome for best performance. In order to enable popup windows in Chrome for Banner 9, type **chrome:settings/content/popups** in the address bar. Add banner.eiu.edu to *Allow* list.

See screenshot on next page...



## **Application Navigator**

Application Navigator provides a single interface to seamlessly navigate between Banner 9 JAVA pages and Banner 8 Oracle forms.

Sign in to the Application Navigator using your NET ID and PASSWORD. The following features will be available after log-in:

- Menu Icon (CTRL+M) = The Menu icon is located in the upper-left corner of the application. Clicking this icon opens the Banner Menu. Two options will then become available: Banner will display all of the available modules and My Banner will display your personal list of pages. Select the page you are interested in opening and click Enter.
- Search Icon (CTRL+Shift+Y) The Search icon is also located in the upper left corner, just to the right of the Menu Icon. Clicking on this icon opens the Search window. You can then navigate to a desired page by entering the descriptive name or seven-letter Banner acronym of the page and pressing Enter.
- Recently Opened Icon (CTRL+Y) The Recently Opened icon is right-side adjacent to the Search Icon. It appears, along with a number representing the total count of pages opened, after you have launched the first page in a session.
- Home Page Eastern Illinois University Displays the name of the university and links back to the Application Navigator landing page.
- Banner User Name Displays the Banner Username of the person logged into the account.
- Search box in the center of the page (CTRL+Home) \_\_\_\_\_ Like the Search Icon, you can enter either the descriptive name or the Banner acronym for a page in this box.
- Help Icon Displays help information for page currently being viewed.

• **Keyboard Shortcuts** — The Application Navigator page includes the following set of shortcuts in the bottom right corner of the page:

CTRL+M (Displays the Menu)
CTRL+Y (Displays the open items)
CTRL+SHIFT+Y (Search)
CTRL+SHIFT+L (Help)
CTRL+SHIFT+F (Sign Out)

\* It is important to remember to use the Sign Out link [ Sign Out ] in the upper right corner when closing the application instead of closing your browser to ensure that you are logged out of the session. Once logged out, you should receive the following message:

# **EIU WEB BASED SERVICE LOGOUT**

You have now been logged out of the system you were using.

To completely logout and prevent access to your account by another user, you MUST close your browser completely.

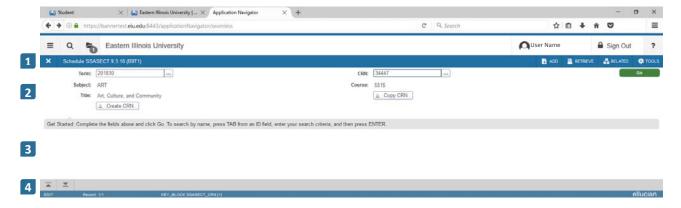
Be aware, closing a tab in a browser is not the same as closing the browser completely. You must close all windows the browser is using.

#### For Mac:

- Click the "Safari" (or other browser) icon on the dock.
- Click the "Safari" (or other browser) button on the Menu toolbar in the upper-left corner of the screen.
- Click "Quit Safari" (or other browser) to completely close the browser application.

## **Basic Navigation**

The basic navigation of each page includes the page header, key block, sections, and user activity:



# 1) Page Header



The page header is part of the basic navigation and contains the following items:

- 1. Page close icon X:
- **2. Page title**, which is formatted according to the preferences established on the User Preference (GUAUPRF) page;
- 3. Add and Retrieve icons, which are used with Banner Document Management;
  - \*While Banner Document Management is installed at EIU, you may not have user access.



- **4. Related Menu**, which displays a list of pages you may want to reach from this page such as output from a process you executed (Options Menu in Banner 8);
- **5. Tools Menu**, which includes *refresh*, *export*, *print*, *clear record*, *clear data*, *item properties*, *display ID image*, and other options controlled by the page.

## **Options Menu**

Part of the **Tools Menu**, **Options** may list either different tabs that are available for a particular page or different sections within a page.

## **Page Layout**

This selection is available from the **Tools Menu (Alt+Shift+T**). There are two different layout options to choose from:

Compact (default) – reduces excessive white space and increases amount of information visible on a page, limiting the need to scroll vertically;

Expanded – displays pages with increased white space and reduced information visible per page; may require scrolling to view all information.

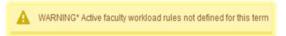
## **Notification Center**

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 (Green with encircled checkmark)



Warning messages (Yellow with yield sign and exclamation mark)



Error messages (Red with encircled exclamation mark)



Informational messages (Blue with encircled letter "i")



Highlighted box indicates number of messages to be corrected to continue in the page:



Click in the numbered box to open or close the Notification Center.

# 2) 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.

When the cursor is in the key block, the information is displayed in a column format. When you leave the key block, the fields in the key block are disabled. When you leave the key block by clicking the **Go** button, the data is rearranged into a linear format.

To access the body of the page, populate the key block data and then click **Go** [ \_\_\_\_\_\_\_\_].

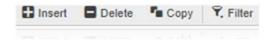
You can return to the key block if you are in the body of a page by clicking **Start Over** [ Start Over ].

## 3) 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 you are using. Each section contains related information.

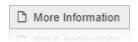
Sections of data are accessed by scrolling up and down the page. They can be opened or collapsed by clicking on the arrow on the far left side of the section header. Some sections are accessed by using tabs that group information in a meaningful way.

#### **Header Icons**



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



In addition to these, a **More Information** button may be available on select pages. This replaces the Banner 8 equivalent light bulb icon.

## **Required Fields**



An asterisk (\*) displayed next to a field name indicates that the field requires a value before you can continue the page. The system uses the definition of the field as it is used in the application to determine

if it is required. For fields that use conditional logic, the asterisk (\*) is not displayed. If you leave a section or 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.



In a grid layout, values for a field can be sorted by column. When a column is selected, the title of the column will appear in italics. An up or down arrow next to the column field name indicates the current sort order for the field (e.g. ascending/descending). Clicking the field label reverses the sort order for the column.

## **Dates**

You can either enter the date directly or use the calendar icon for selection. The date format is mmddyyyy. To enter the current date, type any letter and **[Tab]** (see *Shortcut for Entering Current Calendar Date* below)

## **Shortcut for Entering Current Calendar Date**

When entering the current date in a date field, typing any alpha character in the box and pressing the Enter/Return key will bypass the calendar lookup and automatically load the current day's date.



Pressing this button next to a field will display the Option List. This list provides search features for quick lookup of a field value.

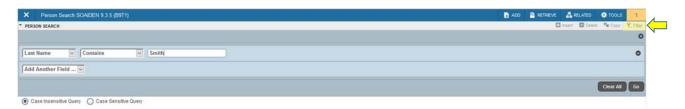


The option list gives the choice of executing a **Person Search**, a **Non-Person Search**, or an **Alternate ID Search**. The primary function we'll be using is **Person Search**. This function allows searches to be made by *ID*, Last Name, First Name, Preferred Name, Middle Name, Change Indicator, and Type.

## Wildcard Lookup

When utilizing the search function, you may perform either exact match lookups or partial match lookups when some of the information is unknown. To perform a partial match lookup, you will use a "%" to replace the unknown information. For example, when searching for a student with an incomplete ID number, you may enter the known information as E1250%%45.

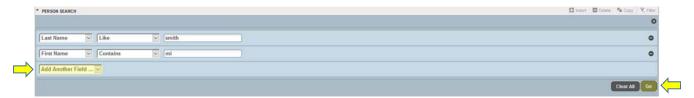
## **Filtering Data**



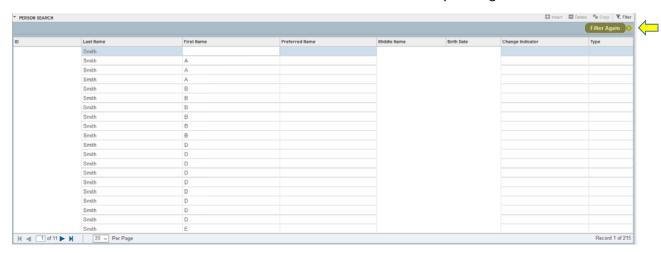
Filtering data in a section is possible if there is an active **Filter** icon in the upper right corner of the section header. Use the following steps to filter data in a section.

## Filtering Procedure

- 1. Click the active **Filter (F7)** icon for the section.
- 2. Choose the field you want to filter from the Add Another Field drop-down list.
  - \* When searching for data, you must enter at least one field to generate results.
- 3. Choose an operator from the drop-down list. Operators include *Contains, Like, Starts With, Ends With, Equals, Not Equal, Not Equal* or *IS NULL, IS NULL, IS NOT NULL*. 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 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 have selected.
- Optional: If you want to include additional fields in the filter criteria, choose field from the Add Another Field menu, select an operator, and enter a value for the field you selected. Repeat this step until all filter criteria are entered.



6. When all filter criteria are entered, click **Go (F8)** to execute the query and 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 and 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.
- Pagination Controls



Data in Banner can be viewed one record at a time or in a grid, depending on the page properties. When viewing one record at a time, you can page through the records using the pagination controls (*first*, *last*, *next*, *previous*, or *specific page number*).

Multiple Records in a Section



If multiple records exist in a section, you can select the drop down arrow in the **Per Page** dialog box to view more than one record at a time.

#### **Buttons**

Banner transformation includes several buttons.

Button	Function
Go (F8)	Use the Go button to advance to the body of the
	page after populating the key block.

Save (F10)	Use the Save button to save changes on the page.
	The Save button is located on the bottom right
	corner of the page.
Section Navigation	Use the Next Section button to navigate to the
Next Section (Alt+Page Down)	next block of data. Use the Previous Section
Previous Section (Alt+Page Up)	button to navigate to the previous unit of data.
	The Next Section and Previous Section buttons are
	located at the bottom left of each page.
Select (Alt+S) and Cancel (Ctrl+Q)	Use the Select button to select and retrieve data
	from a called page to the current page. Use the
	Cancel button to return to the called page without
	retrieving any data. When you need to go to a
	secondary or called page to retrieve data, the
	Select and Cancel are presented at the bottom of
	the page.
Start Over (F5)	Use the Start Over button to return to the key
	block of the page.

# 4) Section Navigation and User Activity

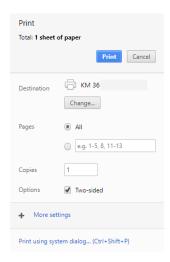


At the bottom of each section are button icons and an information display about the designated page. These may be used for navigation to additional information and may include dialog about actions that are required for that page.

- 1. Previous Section button: Navigates backwards in the sections (Alt+PageUp).
- 2. Next Section button: Navigates to the next section of the page (Alt+PageDown).
- **3.** Activity Date: Shows date and time associated with last recorded save.
- **4.** Activity User: Shows name of account user creating or modifying the record.
- **5.** *Save* button: Used for saving your data.

## **Banner Printing**

In order to print a banner screen, first navigate to the **Tools Menu** and select the **Print (Ctrl+P)** action. This will open a print dialog box where you can select the desired printer. On this menu, you can alternatively choose to access your own computer system's printer dialog box.



## **Exporting Data from Banner**

Banner makes it very easy to export data. Once you have accessed a desired page, go to the section from which you wish to export. Next, select the Tools Menu to view Export button. Lastly, save the export-ready document.

Following is an example of how to export class roster data from SFRSLST:

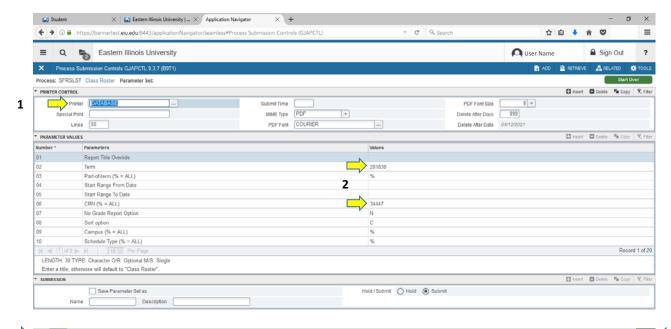
In the Key Block, click Go (F8).

#### **SFRSLST**



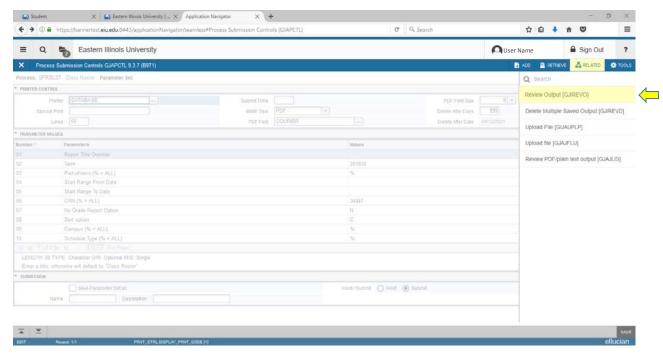
- 1). In the PRINTER CONTROL section, select DATABASE in the Printer dialog box.
- 2). In the PARAMETER VALUES section, enter the desired term and CRN #.
- 3). Click the Next Section (Alt+Page Down) button (arrow down) in the Section Navigation area.
- 4). Click the Save (F10) button in the bottom right corner of the Section Navigation.

## SFRSLST results (1 of 5)



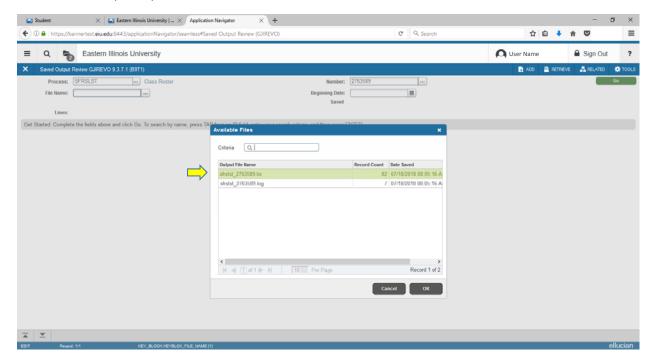
Click on the Related (Alt+Shift+R) button in the Page Header bar and select Review Output [GJIREVO].

SFRSLST results (2 of 5)



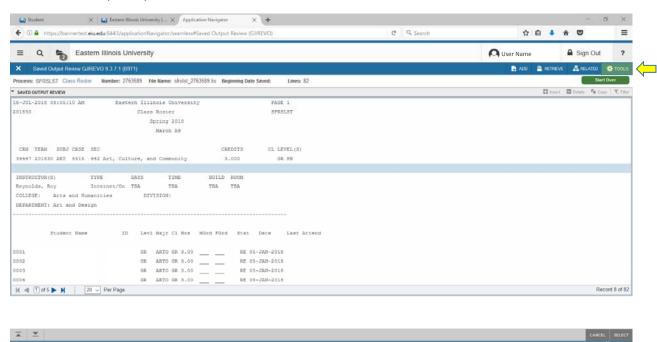
Click on the desired file in the Available Files dialog box.

## SFRSLST results (3 of 5)



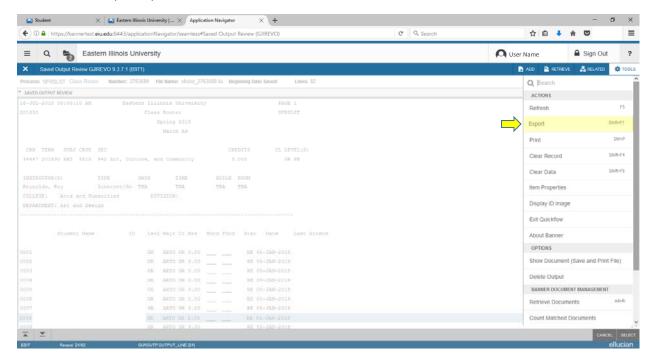
Select the **Tools** button from the **Page Header** bar.

## SFRSLST results (4 of 5)



With the **Tools** button highlighted, select the **Export (Shift+F1)** action.

## SFRSLST results (5 of 5)



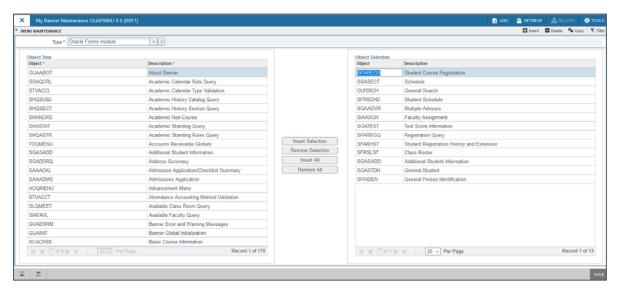


When exporting from Google Chrome, you will receive the following download dialog box.



Chrome will automatically download your file after which the file name will appear at the bottom left of the screen. From this box, you can choose to open either the file or the containing folder.

## My Banner Personal Menu (GUAPMNU)



Use this page to create a personal menu tied to your Banner user ID. A personal menu contains the pages, jobs and menus that are most important in your daily work. Once the personal menu is created, you may access it from the main menu. This page will contain three parts:

The Left Pane – Lists the available pages, jobs or menus that may be added to a personal menu. When you select an object type from the pull-down list above this pane, a list of associated objects appears in the left pane.

The Middle of the Page – Contains buttons used to insert your selections, remove selections, insert all items listed from the left pane, and remove all items from the right pane.

The Right Pane – Lists the contents of the personal menu. The field above the right pane shows the Banner user ID associated with the person logged on to the system.

To add objects to a personal menu, select names in the left pane by double-clicking them, and then use the Insert or Insert All button. To remove objects from a personal menu, select names in the right pane by double-clicking them, and then use the Delete or Delete All button.

## Shortcut to creating your My Banner list:

Beginning with the Object Selection panel (the right panel), select the first open record. This is displayed as a box with a cursor available. Enter the seven character page and arrow down to create the next record. You may enter as many pages as you wish. Remember to select Save before exiting the page.

You will have to sign out and sign back in to see changes in your My Banner.

# **Keyboard Shortcuts:**

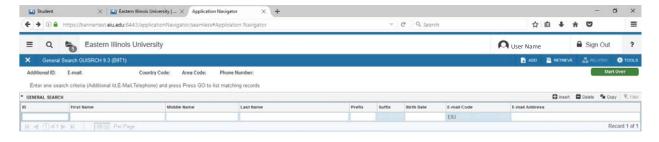
Function/Button	Keyboard
Home	Shift + Home (returns to Main page)
Go	Enter
Save	F10
Help	Ctrl + Shift + L (pop-up window)
Tools Menu	Alt + Shift + T
Lookup	F9
Filter	F7
Go (on Filter)	F8
Select	Alt + S
Edit	Ctrl + E
Duplicate Item	F3
Count Query	Shift + F2
Insert Record	F6
Next Record	Down Arrow
Previous Record	Up Arrow
Clear Record	Shift + F4
Duplicate Selected Record	F4
Delete Record	Shift + F6
Next Block/Section	Page Down
Previous Block/Section	Page Up
Next Field	Tab
Previous Field	Shift + Tab
Clear Field	Backspace
Clear Data	Shift + F5
First Page	Ctrl + Home
Last Page	Ctrl + End
Tab Selection	Ctrl + Shift + 1 (2, 3, 4)
Cancel (window)	Esc (When a window is open and a
	Cancel button is displayed, the
	Escape key can be used to close
	the window.)
Start Over	F5
Export	Shift + F1
Print	Ctrl + P
Exit	Ctrl + Q

Below are screenshots of some commonly used banner pages:

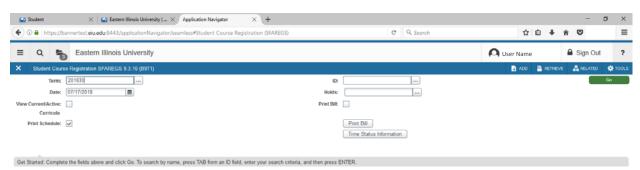
#### **GUISRCH**



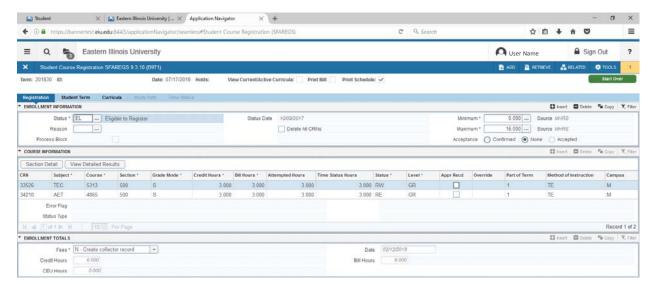
## **GUISRCH** results



## **SFAREGS**



#### **SFAREGS** results

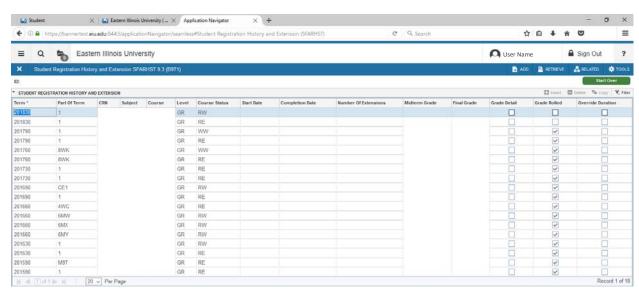


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#### **SFARHST**



#### **SFARHST** results



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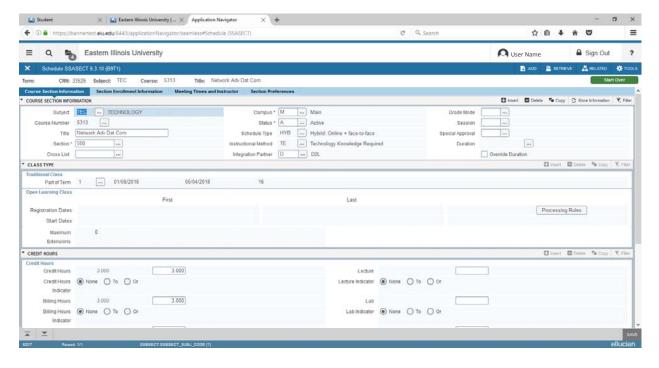
#### **SFRSCHD**



## **SSASECT**



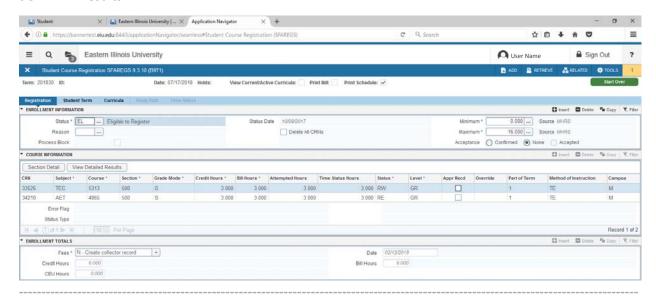
## **SSASECT** results



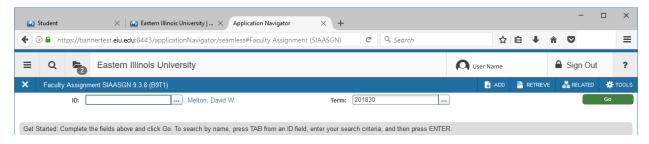
## **SGAADVR**



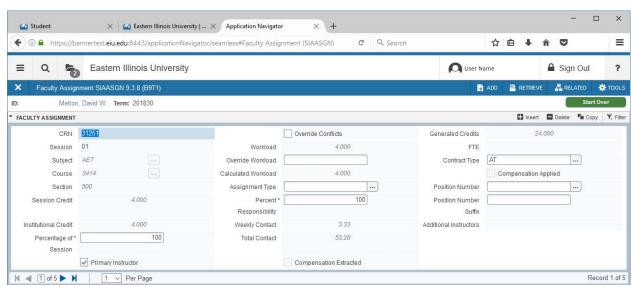
#### **SGAADVR** results



## SIAASGN



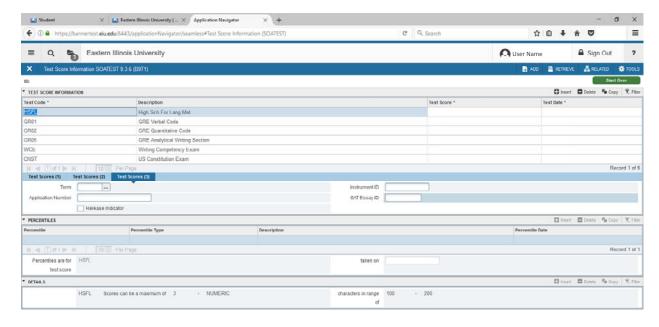
## **SIAASGN** results



#### **SOATEST**



#### **SOATEST** results

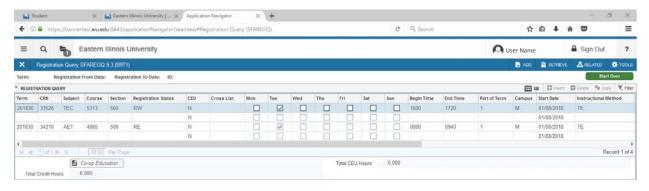




#### **SFAREGQ**



#### **SFAREGQ** results

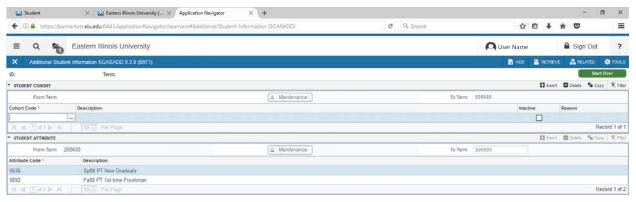


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## **SGASADD**



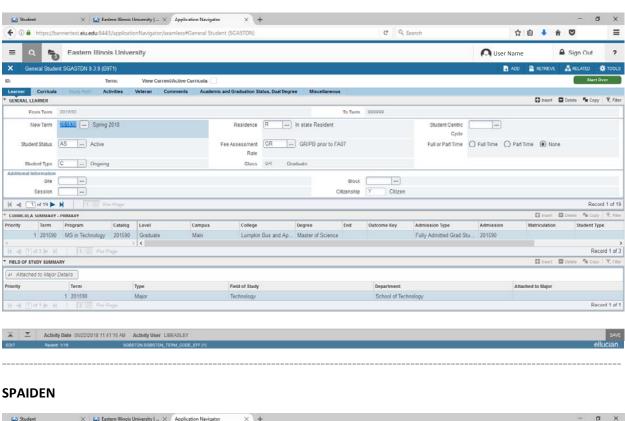
## **SGASADD** results



## **SGASTDN**



#### **SGASTDN** results





#### **SPAIDEN** results

