Banner 9
Navigation Guide

# Contents

Banner 9 Access

Login

Website: https://banner.drexel.edu/BanAppNav

Credentials will be LDAP (same as Drexel One)
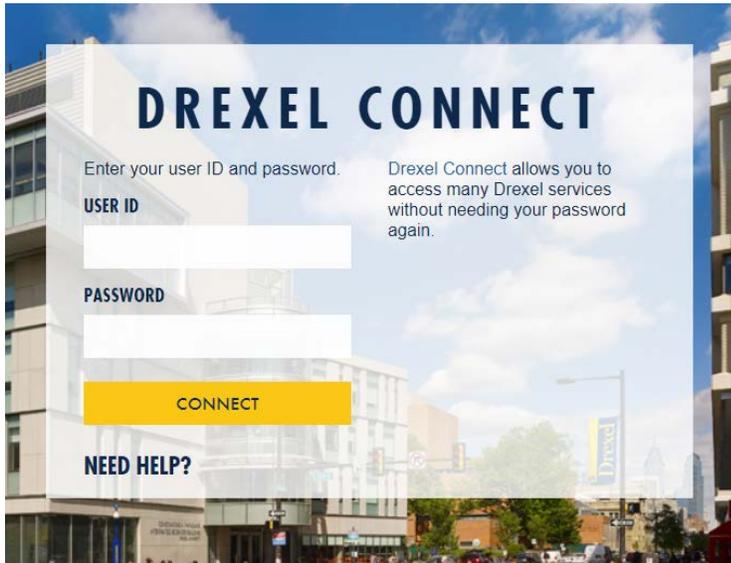
Browser Preference: Chrome

Changes

Terminology

Banner 8	Banner 9
Forms	Pages
Blocks	Sections
Next Block (Ctrl page down)	GO (button)
Rollback	Start Over
Query	Filter
Options	Related
File	Tools
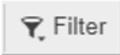
Keyboard

Banner 8	Banner 9
Rollback/Start Over/Refresh - Shift + F7 ↺	F5 **Start Over**
Next Block/Section - Ctrl + PgDn	Alt + PgDn
Previous Block/Section - Ctrl + PgUp	Alt + PgUp
Old F5 to move to form Go To... ▼	Magnifier Tool (Ctrl + Shift + Y) 🔍

Application Navigation

There are nine areas of the landing page that you may use in your navigation of Banner 9

1. **Menu Icon**: The Menu icon ☰ is located on the left corner of the Application Navigation Toolbar. Click on this icon to open the Banner Menu. Find the page you are interested in opening. Select the desired entry and click Enter.
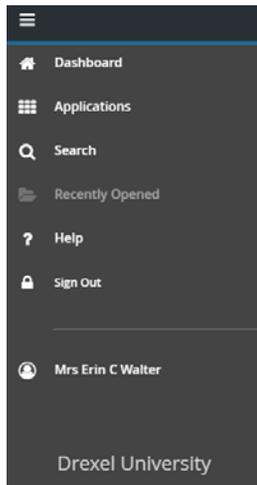
2. **Home Page**: The home page icon 🏠 displays the name of the University and by clicking within this bar, you will return to the Application Navigator landing page.
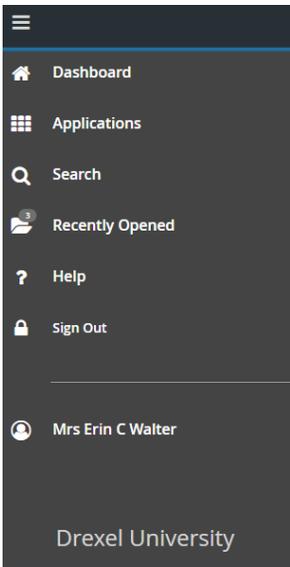
3. **Applications:** The applications icon is where you will find the menu tree by module, My Banner which will show pages you have access to, Banner Self-Service direct links etc.
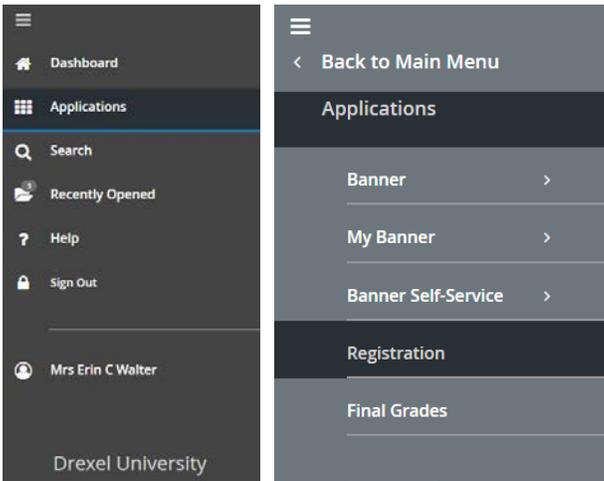
4. **Search Icon**: The search Icon is located on the Application Navigation Toolbar, just to the right of the Menu icon. Click this icon to open the search window. You can then enter with the descriptive name of the page or the Banner acronym for the page.
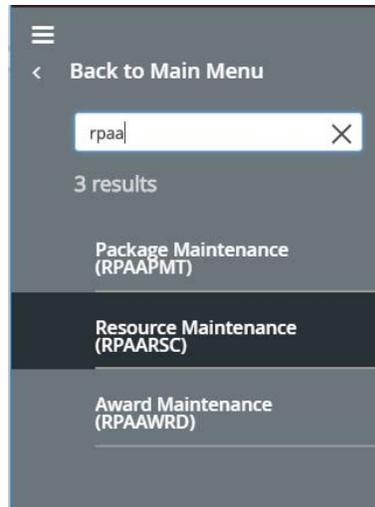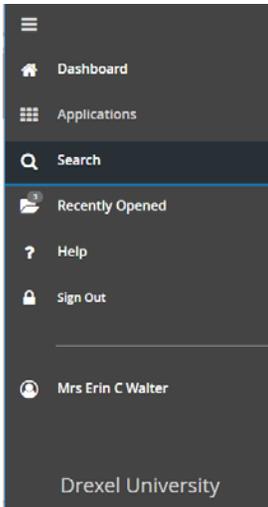
5. **Recently Opened Icon**: The Recently Opened icon is located on the Application Navigation Toolbar, just to the right of the Search icon. It displays with a count of pages after you have opened the first page in an application. Open the list and select a page to access it.
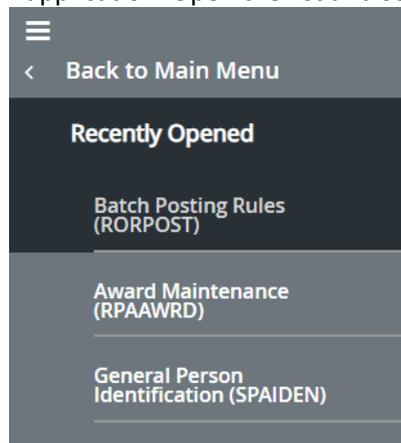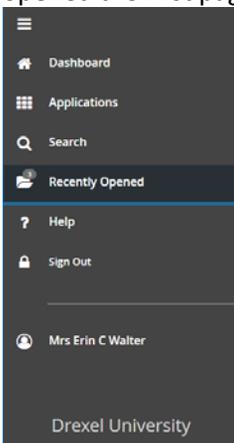
6. **Help Icon**: By selecting this icon , help information will display about the page you are currently viewing.

ellucian. Banner General Online Help

Contents | Search

E-mail Address (GOAEMAL) page

Use this page to record one or more e-mail addresses for any Banner ID.

Note: This page will allow you to specify if an e-mail address, regardless of type, should appear on the web. The **Web** check box on the E-Mail Address Type Validation (GTVEMAL) does not determine this; instead, it specifies if this type of e-mail address will be included in LOVs on the web.

Use this page to set up one or more e-mail addresses for any Banner ID. A user can have multiple e-mail addresses of the same e-mail address type (for example, personal and professional). Only one address, however, can be designated as the preferred address.

A duplicate is defined as one ID having two or more records with the same e-mail type and e-mail address.

E-mail page at validation
Certain conditions must be met for an e-mail address to validate.

Main window
Use this window to establish one or more e-mail addresses for any Banner ID.

Key block
Use this section to identify the person for whom you want to establish an e-mail address.

E-Mail Address section
Use this section to enter e-mail address information for the person.

7. **Sign Out button**: It is important to remember to use the Sign Out button in the Application Navigation Toolbar when closing the application instead of just closing your browser to make sure you are logged out of Banner 9.

8. **Banner User Name**: The person icon displays the Banner Username of the person logged into this account.
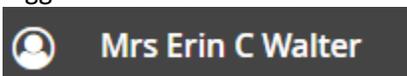
9. **Key Board Shortcuts**: Application Navigator page has a set of keyboard shortcuts, which you can review by clicking on Keyboard Shortcuts in the bottom right corner of the page. – CTRL+M (Display the Menu), CTRL+Y (Display the open Items), CTRL+SHIFT+Y (Search), CTRL+SHIFT+L (Help) and CTRL+SHIFT+F (Sign Out)
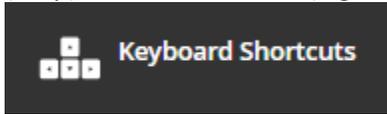
10. **Search Box**: In this box, you enter either the descriptive name of the page or the Banner acronym for the page. Find the desired entry and click Enter.
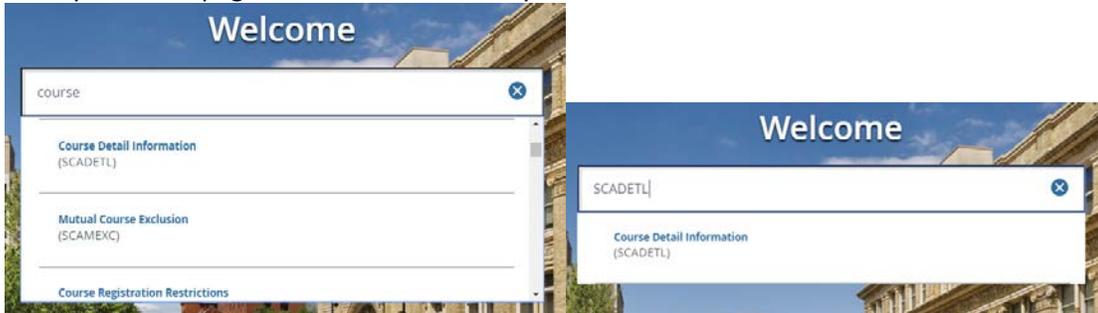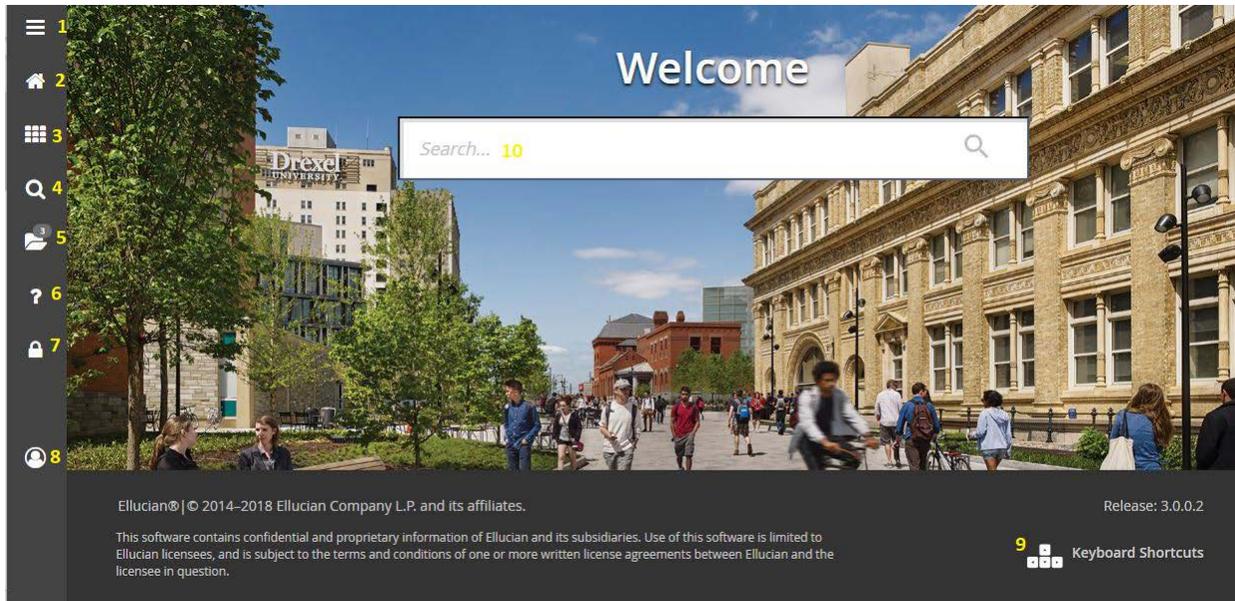
Page Navigation

ICON	KEYBOARD	EXPLANATION
SAVE	**Save** (F10)	Saves all changes made in a form since the last time you saved. Banner also refers to save as Commit in some messages.
Start Over	**Rollback/Refresh** (F5)	Clears all information and returns you to the Key Block of a form.
SELECT	**Select**	Enters the highlighted value into the current field of the form you are working from. List of values uses OK as the select.
Insert	**Insert Record** (F6)	Inserts a new blank record into a group of existing records.
Delete	**Remove Record** (SHIFT+F6)	Removes all information for the record. When you Save, the record will be deleted from the database.
Previous Record	**Previous Record** (UP ARROW)	Moves the cursor to the first enterable field in the previous record.
Next Record	**Next Record** (DOWN ARROW)	Moves the cursor to the next enterable field in the next record. If the cursor is at the last record, a new record is created.

ICON	KEYBOARD	EXPLANATION
	Previous Block/Section (ALT+PG UP)	Moves the cursor to the previous information block in a form.
	Next Block/Section (ALT+PG DOWN)	Moves the cursor to the next information block in a form. If the next block is in another window of the form, that window will be opened.
Filter Filter Again	**Enter Query/Filter** (F7)	Opens a filter form and lets you enter search criteria to see what information is already in the database.
Go	**Execute Query/Filter** (F8)	In query mode, searches the database and displays any records that match the search criteria.
CANCEL	**Cancel** (CTRL+Q)	Cancels a query and takes a form out of query mode.
TOOLS	**Actions/Print** (CTRL+P)	Captures the active screen (only what you can see) and prints it to your local printer.
?	**Help** (CTRL+SHIFT+L)	Displays the Help window for the current field.
X	**Exit** (CTRL + Q)	In a form, the Exit command takes you out of the form. In a query mode, the Exit command cancels the query.
Q	**Search** (CTRL+SHIFT+Y)	Activates a window, where users can navigate to another form without having to return to the main menu.
TOOLS	**Actions/Export** (SHIFT+F1)	Extracts data to an excel spreadsheet.
[_____ ...]	**List of values** (F9)	Lookup values
Copy	**Copy Record** (F4)	Copies or duplicates previous record.
	Related to Current (ALT+SHIFT+R)	Related Forms (similar to options menu)
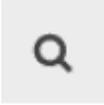
ICON	KEYBOARD	EXPLANATION
	Drills down on some forms (F3)	Drills down to some related forms
	Toggle Menu (CTRL+M)	Brings up Banner Main Menu.
	Toggle Open Applications (CTRL+Y)	Forms previously opened in Banner. Function Keystroke Function Keystroke Function Keystroke

WORKFLOW – has different icons on top

Tools – OPTIONS Section shows another way to navigate the blocks

Messages / Notifications

Type of Information that is displayed notifying user of information, successful actions, warnings and errors.
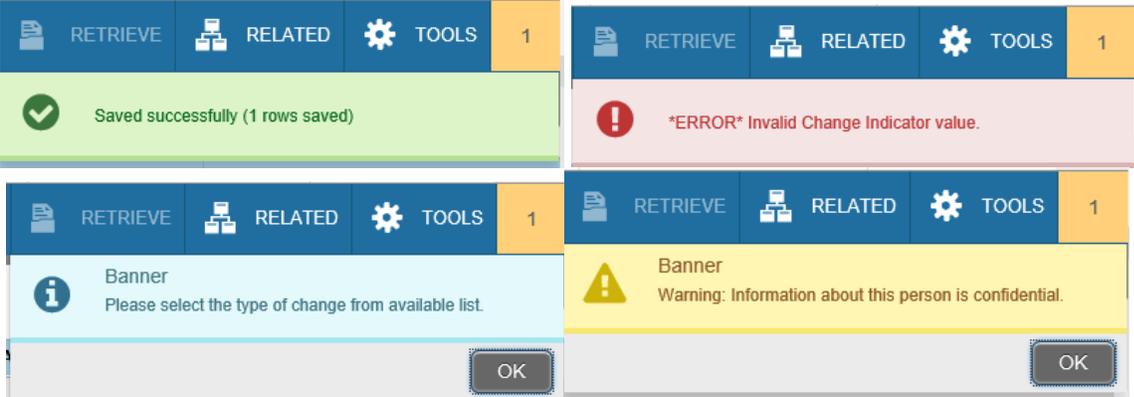
Things to Note:
- # indicate how many errors occurred
- Errors are displayed in red and display affiliated with the field/record in error
- Multiple errors displayed together
- Have to click notification to clear

Page Layout

Page Header

1. **Exit** (Ctrl + Q) – Close form
2. Page Name, version and instance (DUPROD, DUSIMS)
3. **Related** (Alt + Shift + R) – Provides quick access to related pages
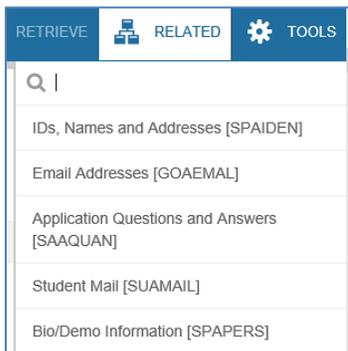
4. **Tools** (Alt + Shift + T) – Provides access to Actions and Options
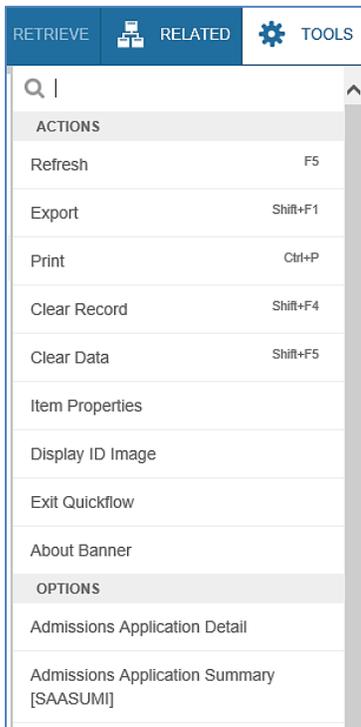
Record Actions

(Buttons will be grey when not usable)

Insert (F6) – create a new record
Delete (Shift + F6) – delete selected record
Copy (F4) – Copy selected record
Filter (Query Mode) (F7) – Filter records/enter query mode
        Execute (F8) – While in query mode, press Go to execute
        Exit Query (Ctrl + Q) – Press X –Exit- to exit query mode

List of Values (F9) – Select the ellipsis (…) on any field to see a list of valid values.

Record Navigation

1. **First Page** – Navigate to first page of records
2. **Previous Page** (↑)– Navigate to previous page of records
3. **Record** – Quickly navigate to a specific record by entering the record number
4. **Next Page** (↓) – Navigate to next page of records
5. **Last Page** – Navigate to last page of records
6. **Per Page Drop-down** – Select to change number of records displayed on screen
7. **Record Count** – Shows which record you have selected and the total number of records

Page Footer
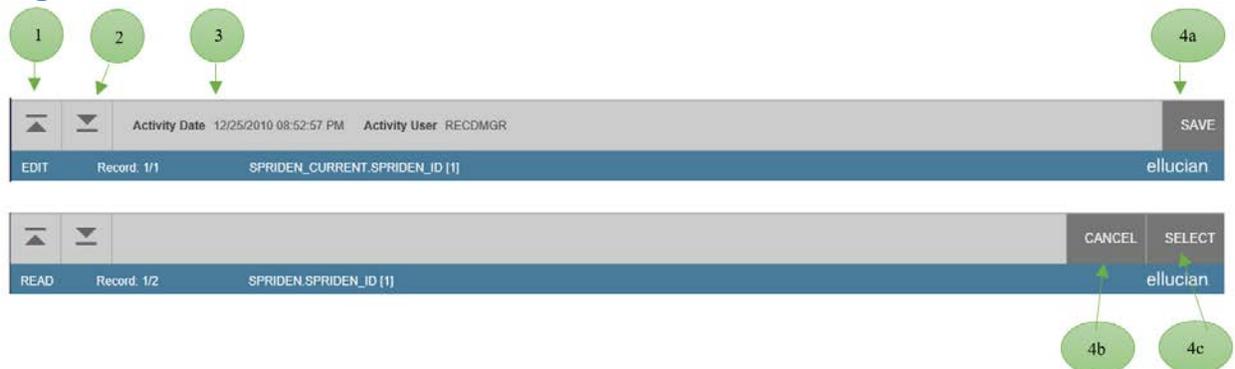
1. **Previous Selection** (Alt + Pg-Up) – Navigate to previous Block/Tab/Page
2. **Next Selection** (Alt + Pg-Down) – Navigate to next Block/Tab/Page
3. **Record Information** – may contain Activity Date and User

4. **Action Buttons**
   a. **Save** (F10) – save current changes
   b. **Cancel** (Ctrl + Q) – cancel selection
   c. **Select (Alt + S) – select and return value**

Searching Data in Key Block

Adding fields to a Search

Filtering Data on an Open Page

Filter Again – gives option to add fields to previous search
   d.

Person Search

1. From any form with an ID field, Click on the ellipsis (…)
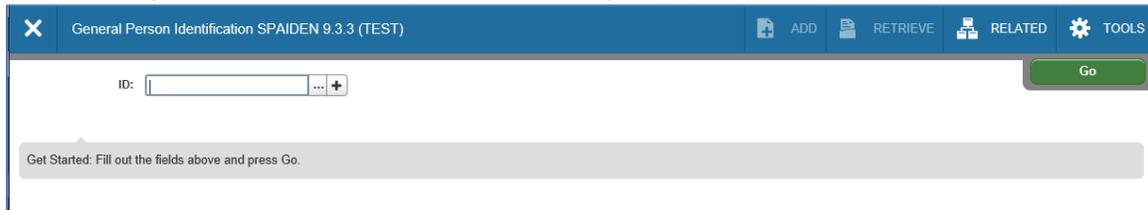
2. Select Person Search
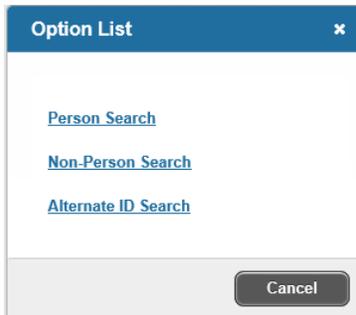
3. From the drop down list, select Last Name
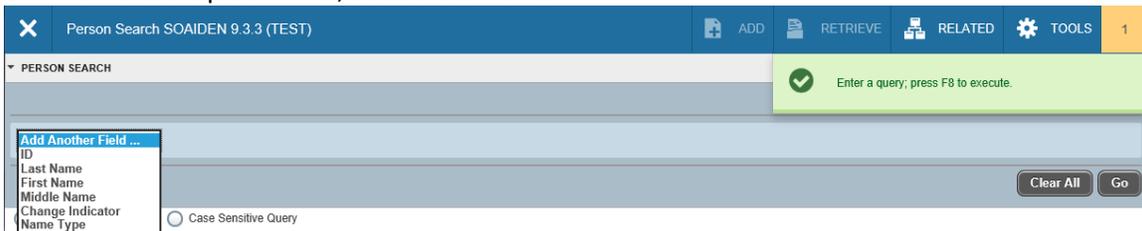
4. Enter a portion of the Last Name
5. Select First Name from the drop down and enter a portion of the First Name

a. Note: Wildcards % are permitted but not required – see example below

6. Press Go (F8) – The results will be displayed

7. Review the records. If you have located the desired record, and select it and click Select (Alt +S). You will return to the previous screen with the ID populated. If you still don't see the student you are looking for, see 7a-c below

   a. Select Filter Again (F7) and add more criteria (Return to Step 3), or select Next Selection (Alt + Pg-down)

   b. The Sounds Like window will appear

Soundex Search SOAIDEN 9.3.3 (TEST)

Sounds Like...Last Name

First Name

Search   Cancel

c. Enter your search criteria and select Search – Return to step 7.
Do not use wildcards % in the Sounds Like search

Tricks

Exit without saving
- Use tab to select option
- Then Enter

Warning! Possible loss of changes.
Do you want to save changes?

Yes   No   Cancel
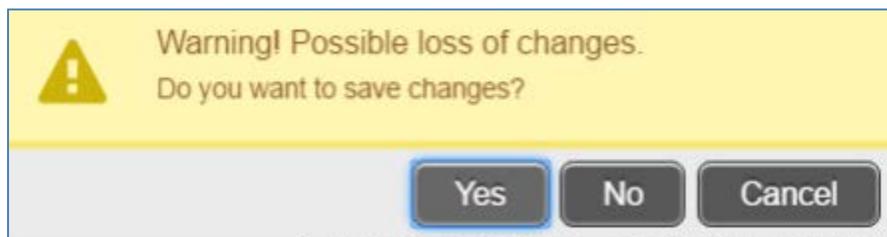
Required Fields

Term *   CRN *

Required fields have *

Single Record / Multiple Record Toggle

Ctrl + G

Detail Code Control Form - Student TSADETC 9.3.4 (DUSIMS)

ADD   RETRIEVE   RELATED   TOOLS

DETAIL CODE CONTROL FORM - STUDENT

Insert   Delete   Copy   Filter

| Detail Code *	Detail Code Description *	Type *	Category *	Grant Type	Priority *	Refund Code	Direct Deposit	Refundable	Receipt	Active	Term Based	Aid Year Based	Like Term	Like Aid Y
0001	Pell Grant	P	FA3		000		☐	☑	☐	☑	☑	☐	☐	☐
0002	PHEAA Grant	P	FA3		090		☐	☑	☐	☑	☑	☐	☐	☐
0004	Federal Perkins Loan NDSL	P	FA4		000		☐	☑	☐	☑	☐	☐	☐	☐
0005	Federal Seog Program	P	FA3		000		☐	☑	☐	☑	☑	☐	☐	☐
0006	PHEAA Katrina Emergency ...	P	FA3		090		☐	☐	☐	☑	☐	☐	☐	☐
0008	PA Fed Stafford Loan Program	P	FA0		090		☐	☑	☐	☑	☐	☐	☐	☐
0009	NJ Fed Stafford Loan Program	P	FA0		000		☐	☑	☐	☐	☐	☐	☐	☐
0010	Fed Stafford Loan	P	FA0		000		☐	☑	☐	☐	☐	☐	☐	☐
0011	Drexel Grant	P	FA1		090		☐	☐	☐	☑	☐	☐	☐	☐
0012	Fed Parent Plus Loan Prog	P	FA0		090		☐	☑	☐	☑	☐	☐	☐	☐
0013	College Ave Student Loan	P	FA0		090		☐	☑	☐	☐	☐	☐	☐	☐
0014	Signature Loan	P	FA0		090		☐	☑	☐	☑	☐	☐	☐	☐
0015	Army Depot FCU Loan	P	FA0		090		☐	☑	☐	☑	☐	☐	☐	☐
0016	Drexel Advantage Loan (FR)	P	FA0		090		☐	☑	☐	☑	☐	☐	☐	☐
0017	NJ "Class" Loan	P	FA0		090		☐	☑	☐	☐	☐	☐	☐	☐
0018	Fed Unsubsidized Ln Program	P	FA0		090		☐	☑	☐	☑	☐	☐	☐	☐
0019	Anticipated Federal Plus Loan	P	FA0		000		☐	☑	☐	☐	☐	☐	☐	☐
0020	National Science Scholarship	P	FA3		000		☐	☐	☐	☐	☐	☐	☐	☐
0021	Anticipated Chase Signature...	P	FA0		000		☐	☑	☐	☐	☐	☐	☐	☐
0022	CitiAssist Educational Loan	P	FA0		090		☐	☑	☐	☑	☐	☐	☐	☐

◀ ◀ 1 of 427 ▶ ▶| 20 ▼ Per Page   Record 1 of 8525

SAVE

EDIT   Record: 1/8525   TBBDETC.TBBDETC_DETAIL_CODE [1]   ellucian

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Detail Code Control Form - Student TSADETC 9.3.4 (DUSIMS)

ADD   RETRIEVE   RELATED   TOOLS

DETAIL CODE CONTROL FORM - STUDENT

Insert   Delete   Copy   Filter

Detail Code 0001 Pell Grant
Type * P
Category * FA3 ...
Grant Type
Priority * 000
Refund Code
☐ Direct Deposit
☑ Refundable
☐ Receipt
☑ Active
☑ Term Based

☐ Aid Year Based
☐ Like Term
☐ Like Aid Year
☐ Like Period
☐ GL Enterable
Pay Type * N ...
Tax Type ...
☑ Title IV
☐ Institutional Charges
☐ Exclude Invoice Print
☐ Payment History

Defaults

Default Amount
Default Term ...
Default Effective Date

◀ ◀ 1 of 8525 ▶ ▶| 1 ▼ Per Page   Record 1 of 8525

SAVE

EDIT   Record: 1/8525   TBBDETC.TBBDETC_DETAIL_CODE [1]   ellucian

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Zoom

How to make Banner BIGGER (browser settings)

Ctrl = increase zoom (CTRL with +)
Ctrl – decrease zoom (CTRL with -)

Ctrl 0 reset zoom to 100%

My Banner

- When using GUAPMNU, you can "rename" objects and they are unique to the My Banner setup. This does not rename objects in the system.
- You can create subfolders in My Banner by adding a folder object to GUAOBJS and then referencing the fold in the My Banner form.
    - Recommend creating folders labeled by office or user with a one up (*REGOFF1, *REGOFF2, etc).
- You can use GUTGMNU to edit what objects belong in subfolders.
- You can copy a My Banner folder from one user to another using GUTPMNU.
    - This is an excellent "trick" to help new hires become more quickly acclimated to Banner.
- Confirm object is part of Banner 9 using GUAPAGE

Troubleshooting

1. Any issues with logging in or get service invocation error try clearing your browsers cache and then launching a new instance of your browser. You may also try incognito window or private browser tab as well.