

APPLICATION NAVIGATOR ***QUICK NAVIGATION GUIDE***

Welcome to the BANNER[®] 9 Application Navigator.

CHROME is the required browser for Banner 9

Sign in URL:

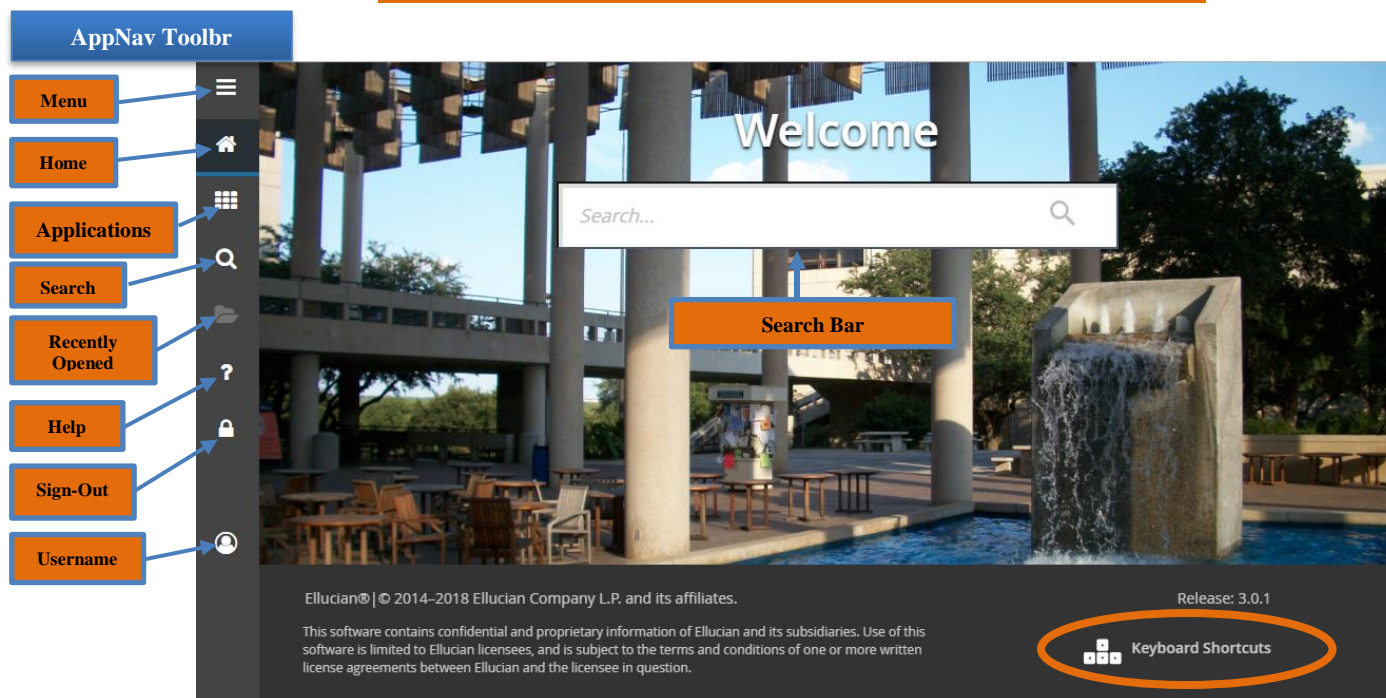
PROD-

<https://banneradmin.utsa.edu/applicationNavigator/seamless>

PPRD -

<https://inbpprd.utsarr.net:8443/applicationNavigator/seamless>

WELCOME TO THE BANNER 9 LANDING PAGE



#	AREA	ICON	FUNCTION
1.	Menu		Click on this icon to open the Banner Menu and find the page you are interested in opening.
2.	Search		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.
3.	Recently Opened		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.
4.	Home Page	N/A	Displays the name of the University and returns the user to the AppNav landing page
5.	Banner User Name		Displays the username for the person logged into the active session
6.	Sign Out Button		Use this when closing the application <u>instead</u> of just closing your browser to make sure you are logged out of Banner 9.
7.	Help Icon		By selecting this icon help information will be displayed about the page you are currently viewing
8.	Search Box	N/A	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.
9.	Key Board Shortcuts		The AppNav page has a set of keyboard shortcuts, which you can review by clicking on Keyboard Shortcuts in the bottom right corner of the page.

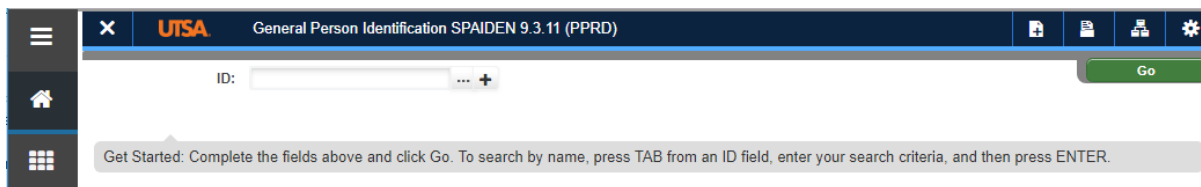
You can return to the Application Navigator landing page by clicking on the UTSA **Banner** home link.

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. Additional shortcuts can be found beginning on page 9.

NOTE: 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.



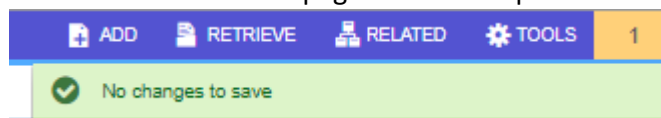
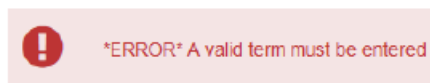
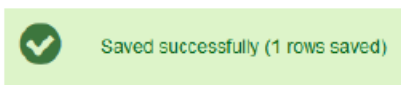
HEADER

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

-  **Page close icon** – back to welcome page
- **Page Title**
This is formatted per the preferences established on the User Preference (GUAUPRF) page.
- **Add/Retrieve Icons**
These are used with Banner Document Management.
- **Related Menu**
This displays a list of pages that can be accessed from this page (Options Menu in Banner 8).
- **Tools Menu**
This includes refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.
- **Notification Center**
The Notification Center is located to the right of the Tools menu and displays the following types of information as needed:

Types of Information that is Displayed

- Green: Successful save of data
- Yellow: Warning messages
- Red: Error Messages
- Blue: Informational Messages
- You can click in the box with the number in the page header to open or close the Notification Center.



KEY BLOCK

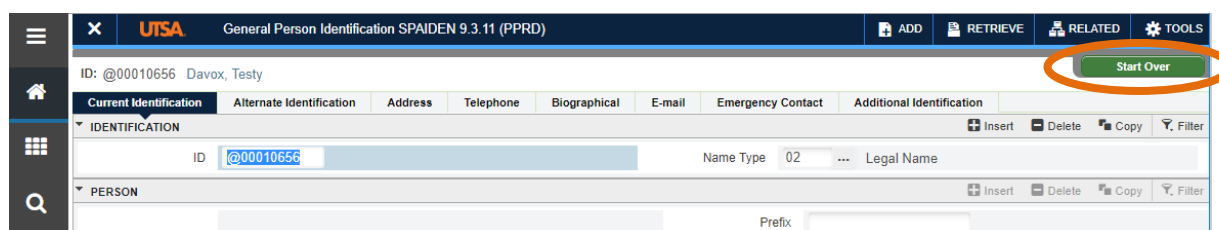
The first block on most pages contains key information. The key block determines what data is entered or displayed on the rest of the page. All the information on the page is related to the key block. The key block stays on the page as subsequent sections are displayed.

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.

When the cursor is in the key block, the information is displayed in a column format. 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**.



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. 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. 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.

REQUIRED FIELDS

An asterisk (*) displayed next to a field name indicates that the field requires a value before you continue on 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 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, values for a field can be sorted. If you have chosen to sort the data, 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.

DATES

You can either enter the date directly or use the calendar icon for date selection. The date format is mmddyyyy. To enter the current date, type any letter and [TAB].

How to make Banner BIGGER

- [Ctrl] [=] increase zoom (essentially ctrl with +)
- [Ctrl] [-] decrease zoom
- [Ctrl] [0] reset zoom to 100%

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.

Telephone Type Validation (STVTELE)

Criteria

Code	Description	Activity Date
1	Most recent previous legal res	01/01/1980
2	Prior legal residence	01/01/1980
4	Emergency Contact 1	01/01/1980
A	SEVIS US Address	01/01/1980
B	Billing	01/01/1980
Bl	Billing	01/24/1992
BU	Business or work	07/26/1994
C	Cell Phone	01/01/1980
D	SEVIS Dependent	01/01/1980
E	Email (maintained by CTIS)	01/01/1980

1 of 2 | 20 Per Page | Record 1 of 28

Cancel

ID search

Click the **"TAB"** from the ID field, a second box will display, enter name, **"%"** then **"TAB"**

The ID will appear or the extended search box will appear.

ellucian Course Summary SHACRSE 9.3.6 (PPRD)

ID:

ellucian Course Summary SHACRSE 9.3.6 (PPRD)

ID:

ellucian Course Summary SHACRSE 9.3.6 (PPRD)

ID:

ellucian Course Summary SHACRSE 9.3.6 (PPRD)

ID:

ID and Name Extended Search

Search Detail

Reduce Search By

Group Type ☐ Person ☐ Non-Person ☒ Both

City

State or Province

ZIP or Postal Code

Press Enter Query or select button to clear search.

Enter search criteria then press Execute Query or select button to reduce search.

Person/Non-Person Count 21

Name Type

Birth Date

Gender

SSN/SIN/TIN

BUTTONS

Banner transformation includes several buttons.

Button	Description
Add and Retrieve	Use the Add and Retrieve buttons to interact with Banner Document Management (xTender) to properly store and review documents.
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.
Select and Cancel	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	Use the Start Over button to return to the key block of the page.

TOOLS DROPDOWN

Upon selecting the **Tools Menu Button**, there are further menu item options you may select to help you navigate through forms. For further explanation, see the table below. **Button Name**

	<p>Search Block</p> <p>Refresh</p> <p>Export</p> <p>Print</p> <p>Clear Record</p> <p>Clear Data</p> <p>Item Properties</p> <p>Retrieve Document</p> <p>Add Documents</p> <p>View Status Indicators</p> <p>About Banner</p>	<p>You may use this block to search for a function housed within the Tools menu (i.e.: Print, Export, etc.).</p> <p>Acts the same as the Start Over button listed above. Will take you back to the Key Information Area to input new search criteria within the same form and perform a new search.</p> <p>Allows you to export the data in the Banner Form to an Excel Spreadsheet. NOTE: You MUST setup your user preferences in XE properly before being able to download! See <i>Banner Finance training page!</i></p> <p>Allows you to print a SCREENSHOT of what is viewable on your computer screen for various Banner XE Forms. Remember – this is NOT the same as ePrint, and will NOT print the total data within a form!</p> <p>Will clear the selected record</p> <p>Will clear the selected data, but leaves total.</p> <p>Provides a brief description of the Document Type Properties (not used frequently)</p> <p>Used to view Banner Document Management files attached to particular line items in Finance Forms. ONLY available for those who have BDM installed and setup on their personal computers! It's similar to the RETRIEVE Menu Button listed above.</p> <p>Used by departments with scanning/Document Management capabilities – allows users with appropriate access to add an attached document to a record within Banner XE through BDM.</p> <p>ONLY VIEWABLE ON SOME FORMS – allows you to view the key for codes within a particular form in Banner (i.e.: In <i>FOIDDOCH</i>, the <i>Status Indicators</i> tell you whether an invoice was paid, approved, voided, etc.)</p> <p>Provides an update on the current version, R3release, and Release Date for the particular form you are viewing within Banner XE</p>
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TERMINOLOGY

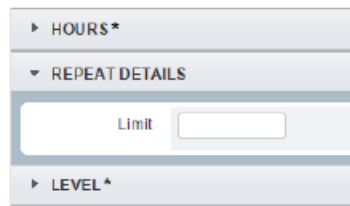
Forms = Pages

From Key Block; Next Block = Go

Go

Blocks become Sections

- Alt Page Down and
- Alt Page Up

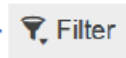



Bottom left icons

Rollback = Start Over

Start Over

Query = Filter



FAQS

What browsers are supported?

The recommend browser for Banner 9 is CHROME.

Why can't I find my form/page in Application Navigator?

Application Navigator only shows forms or pages you have permissions to view.

Why aren't my keyboard shortcuts working inside Application Navigator?

Because Banner 9 now launches inside of a web browser, some keyboard shortcuts had to be changed while others no longer work. A complete list of keyboard shortcuts to be used in Application Navigator are included at the end of this document.

If I update my Java client, will Banner 9 be affected?

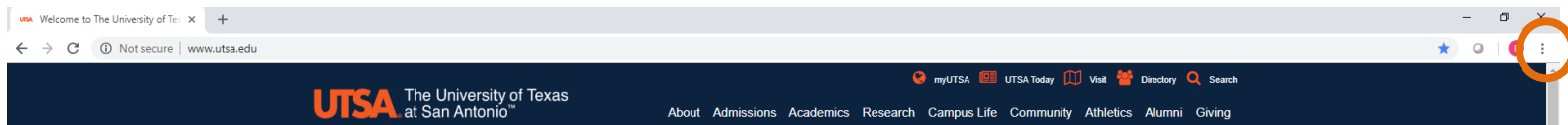
No, Banner 9 will not be affected by updating Java.

For **Appworx users**, Appworx will be affected if Java is updated.

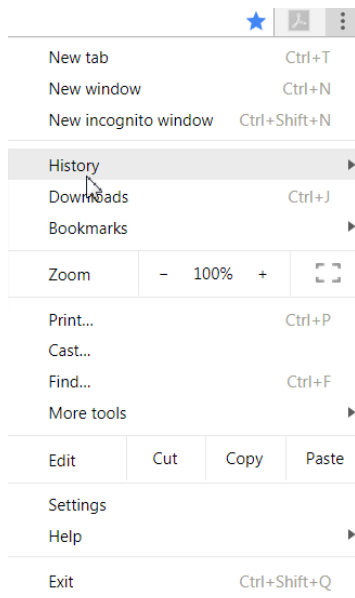
Clearing Cache in CHROME Browser

Open Chrome Browser

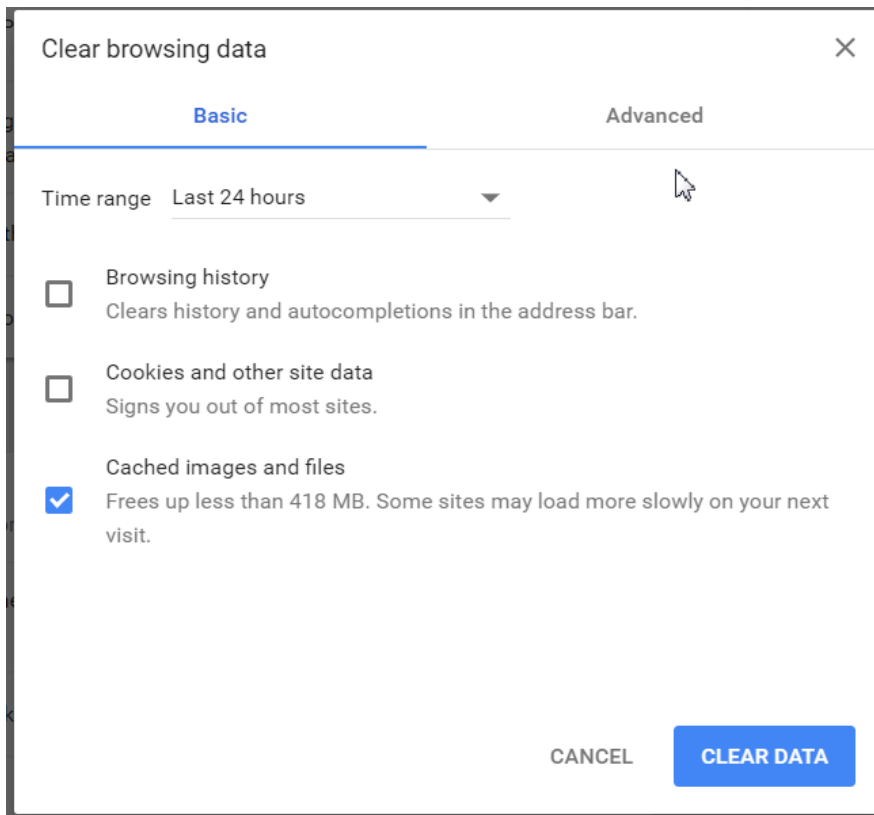
Select the 3 horizontal dots at top right of screen



Select History



Select History again from list on left



Press CLEAR DATA

You are DONE!

Banner Keyboard Shortcuts

The following table lists the keyboard shortcuts that you can use to navigate through Banner versions 8 and 9. Actions with new or updated keyboard combinations in Banner 9 are indicated by **bold** entries.

Action	Banner 9	Banner 8
Application Navigator		
Access Help	CTRL+SHIFT+L	Banner 9 keyboard shortcuts will work in Banner 8 if you are running Banner 8 with Application Navigator and have applied the keyboard shortcut configuration settings.
Access Menu	CTRL+M	
Display recently opened items	CTRL+Y	
Search	CTRL+SHIFT+Y	
Sign out	CTRL+SHIFT+F	
Choose/Submit	ENTER	ENTER
Clear All in Section	SHIFT+F5	SHIFT+F5
Clear One Record	SHIFT+F4	SHIFT+F4
Clear Page or Start Over	F5	SHIFT+F7
Count Query	SHIFT+F2	SHIFT+F2
Copy	CTRL+C	CTRL+C
Cut	CTRL+X	CTRL+X
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, Cancel Query, Close Current Page	CTRL+Q	CTRL+Q
Expand/Collapse Drop-down Field	ALT+Down Arrow	Click field
Export	SHIFT+F1	Extract Data with Key or Extract Data no Key
First Page	CTRL+Home	Not applicable
Insert/Create Record	F6	F6
Last Page	CTRL+End	Not applicable

Action	Banner 9	Banner 8
List of Values	F9	F9
More Information	CTRL+SHIFT+U	ALT+H
Next Field or Item	Tab	Tab
Next Page Down	Page Down	Page Down
Next Section / Block	ALT+Page Down	CTRL+Page Down
Open Related Menu	ALT+SHIFT+R	Not applicable
Open Tools Menu	ALT+SHIFT+T	Not applicable
Page Tab 1 Page Tab 2 and so on	CTRL+SHIFT+1 CTRL+SHIFT+2 and so on	Not applicable
Paste	CTRL+V	CTRL+V
Previous Field or Item	SHIFT Tab	SHIFT Tab
Previous Page Up	Page Up	Page Up
Previous Section	ALT+Page Up	CTRL+Page Up
Print	CTRL+P	SHIFT+F8
Redo	CNTL+SHIFT+Z	Not applicable
Refresh or Rollback	F5	SHIFT+F7
Save	F10	F10
Search or Open Filter Query	F7	F7
Select on a Called Page	ALT+S	CHIFT+F3
Today's Date Autofill	Any letter key, Enter	Any letter key, Enter
Toggle Multi/Single Records View	CTRL+G	Not applicable
Undo	CTRL+Z	
Up/Previous record	Up Arrow	Up Arrow
Workflow		
Release Workflow	ALT+Q	Icon or Menu
Submit Workflow	ALT+W	Icon or Menu

Additional information

- [Banner Documentation](https://utsacloud.sharepoint.com/sites/Banner/SitePages/Home.aspx?RootFolder=%2Fsites%2FBanner%2FShared%20Documents%2FBanner%20Documentation&FolderCTID=0x01200043BEE47CD30BCA44B9321F549942C497&View=%7B95685D22%2DED52%2D4FA2%2D94F7%2DF6C3ED3A5A6B%7D)
<https://utsacloud.sharepoint.com/sites/Banner/SitePages/Home.aspx?RootFolder=%2Fsites%2FBanner%2FShared%20Documents%2FBanner%20Documentation&FolderCTID=0x01200043BEE47CD30BCA44B9321F549942C497&View=%7B95685D22%2DED52%2D4FA2%2D94F7%2DF6C3ED3A5A6B%7D>
- [Banner User Testing guides](https://utsacloud.sharepoint.com/sites/Banner/_layouts/15/start.aspx#/SitePages/Home.aspx)
https://utsacloud.sharepoint.com/sites/Banner/_layouts/15/start.aspx#/SitePages/Home.aspx
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- [Banner ASAP PROD:](https://asap.utsa.edu/)
<https://asap.utsa.edu/>
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<https://inbpprd.utsarr.net:8443/applicationNavigator/seamless>
- [Banner ASAP PPRD](https://tucson2.it.utsa.edu/pls/pprd/twbkwbis.P_WWWLogin)
https://tucson2.it.utsa.edu/pls/pprd/twbkwbis.P_WWWLogin
- [Ellucian Customer Center](https://www.ellucian.com/customer-center)
(Create an Ellucian account to access Ellucian Support Center and Community Resources)
<https://www.ellucian.com/customer-center>