



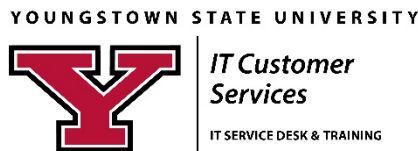
September 2018

Banner 9

Application Navigator

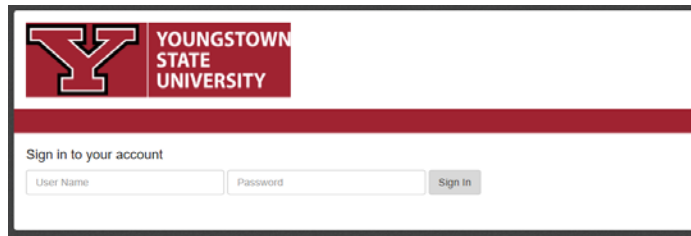
Contents

Accessing Banner 9	3
Navigation: Application Navigator	3
Landing Page	4
Page Header	4
Using the Filter	5
Basic Filter	5
Advanced Filter	5
System Messaging: Success, Warnings, & Errors.....	6
Familiar concepts	6
Other Items:	7
Sections on pages/ Job Submission	8
Sorting	9
QuickFlow.....	9
Supplemental Data Engine.....	10
Data Extract.....	10
Conclusion.....	11
Additional Banner 9 Documents:.....	11
Contact.....	11



Accessing Banner 9

1. Launch a browser and type banner.ysu.edu. The preferred browser for Banner 9 is Chrome. Use TEST for training and PROD for daily work.
2. Enter your YSU User Name and My YSU Portal password.
3. Click Sign in.



Navigation: Application Navigator

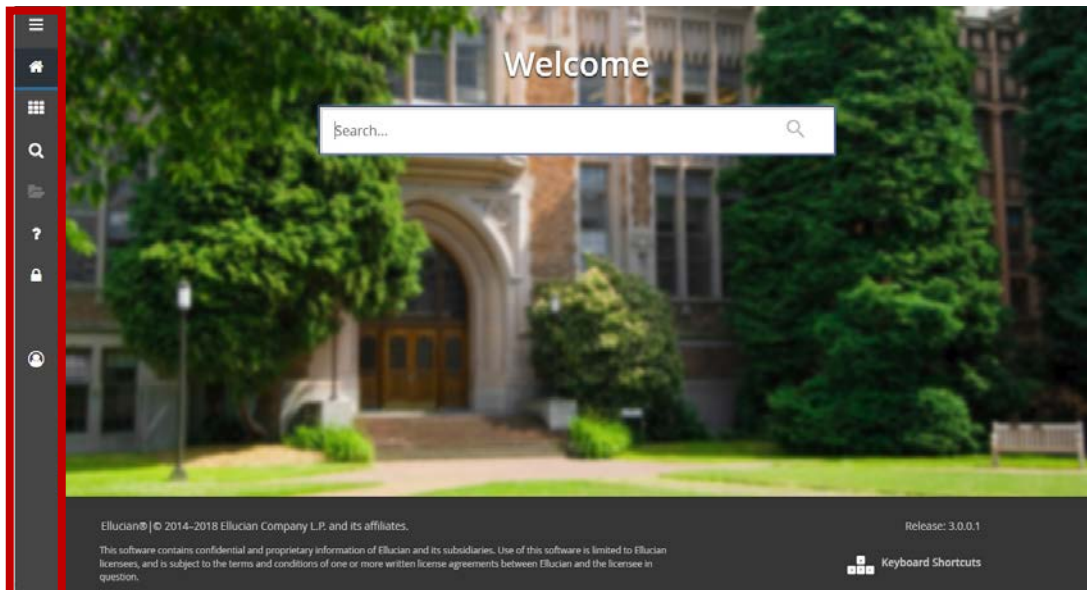
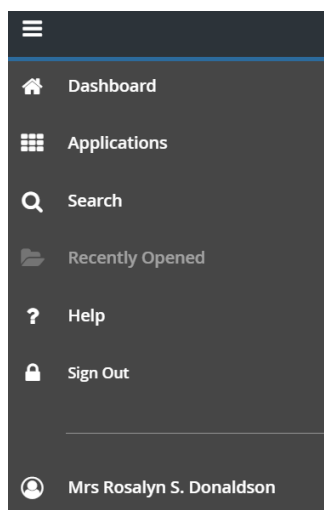
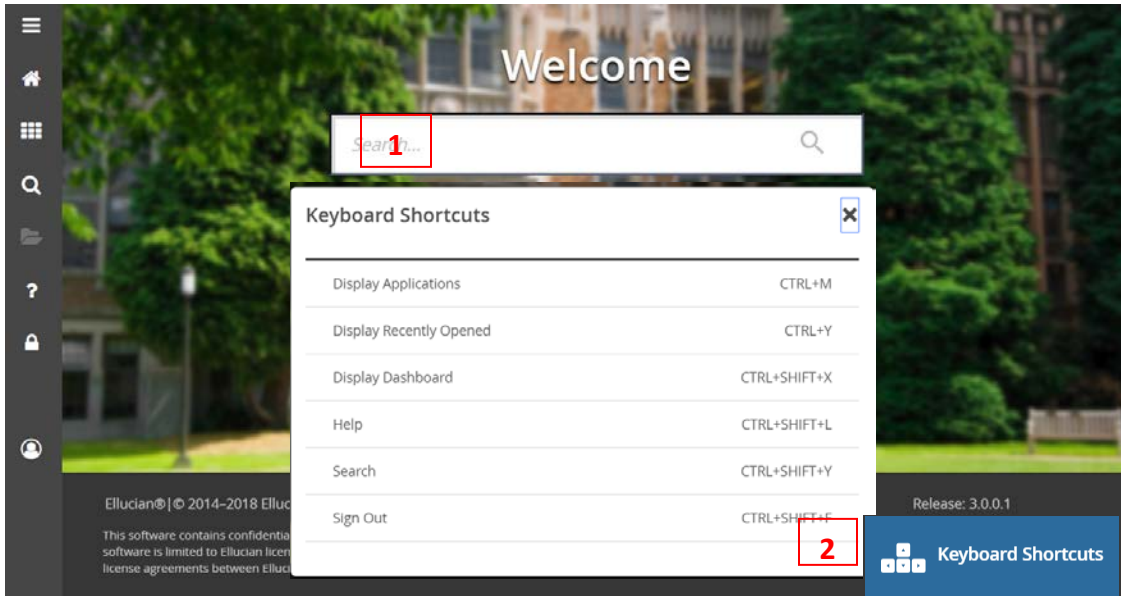


Figure 1 Application Navigator Dashboard



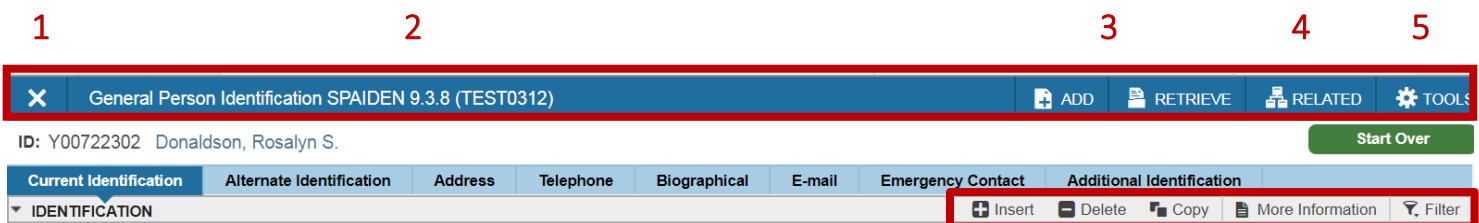
1. **Menu:** click to open or close the Menu.
2. **Dashboard:** returns to the Application Navigator Landing page. (CTRL+Shift+ X)
3. **Applications:** click to view *My Banner*, *Banner* and *SSB menus*. (CTRL + M)
4. **Search:** click on this icon to open the Search window. You can then enter either the descriptive name of the page or the Banner acronym. (CTRL + Shift +Y)
5. **Recently Opened:** it is displayed with a count of pages you have visited. Open the list and select a page to access it. (CTRL+Y)
6. **Help (?)** accesses online help pages (CTRL+Shift+L)
7. **Sign Out:** use the *Sign Out* button to make sure you are logged out of the application. (CTRL+Shift+F)
8. **User:** Banner user that is signed

Landing Page

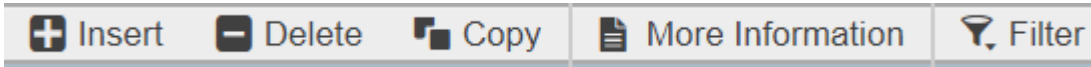


1. **Search box:** in the center of the page: enter either the descriptive name of the page or the Banner acronym for the page. Find the desired entry and click Enter.
Please note: If the requested page has not been transformed, it will open in INB Forms
2. **Bottom right:** Keyboard Shortcuts

Page Header



1. **Page close icon:** X
2. **Page title:** In this example it is General Person Identification SPAIDEN (version number and Instance/clone date)
3. **Add and Retrieve icons:** used with Banner Document Management imaging.
4. **Related Menu:** displays a list of pages that can be accessed from this page.
5. **Tools Menu:** includes refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.



- **Insert:** Insert New Record
- **Delete:** Delete Record
- ***-Required Fields**
- **Copy** records
- **More Information:** University defined Supplemental Data
- **Filter:** OK or double click to return; show GRID Sorting

Using the Filter

The following is an example of using the **Filter** Option. Filter allows you to select specific fields for searching. **Advanced Filtering** allows for Boolean operators to enhance your search.

Basic Filter

The screenshot shows the 'Basic Filter' tab selected. It features several input fields for 'Term', 'Part of Term', 'Registration From', 'Registration To', and 'CRN'. A 'Clear All' button and a 'Go' button are located at the bottom right. Below the filter fields is a table with columns: Term, Part of Term, Registration From, Registration To, CRN, Block Schedule, Subject, Course, Section, Section Status, Campus, Course/Section Title, Schedule Type, and Instruct. The table has three rows: 'Enrollment', 'Maximum', and 'Waitlist'. The 'Maximum' and 'Remaining' columns are highlighted in grey.

Advanced Filter

The screenshot shows the 'Advanced Filter' tab selected. It features a series of filter rows, each with a field dropdown, an operator dropdown (all set to 'Equals'), and an input field. The fields are 'Term', 'Part of Term', 'Registration From', 'Registration To', and 'CRN'. There is also an 'Add Another Field ...' dropdown. The same table structure as the Basic Filter is visible at the bottom.

Advance filters use Boolean operators to help narrow the search results.

This image shows two dropdown menus for Boolean operators. The first menu, for 'Registration From', lists: Equals, Not Equal, Not Equal or IS NULL, Between, Greater Than, Greater Than or Equal, Less Than, Less Than or IS NULL, Less Than or Equal, Less Than or Equal or IS NULL, IS NULL, and IS NOT NULL. The second menu, for 'CRN', lists: Equals, Contains, Like, Starts With, Ends With, Equals, Not Equal, Not Equal or IS NULL, IS NULL, and IS NOT NULL.

System Messaging: Success, Warnings, & Errors

The Notification Center is located to the right of the **Tools** menu and displays four types of messages as needed. Click the number to toggle the message off once it appears.

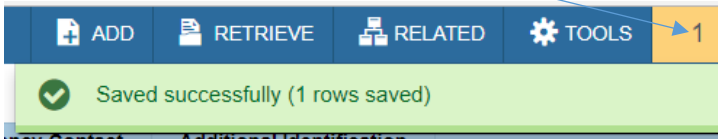


Figure 2 Green - Successful save action

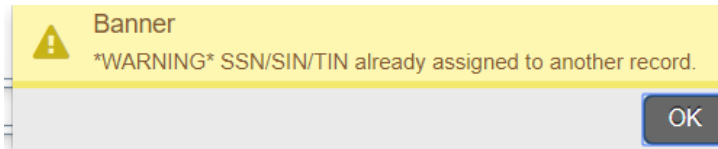


Figure 3 Warning Messages

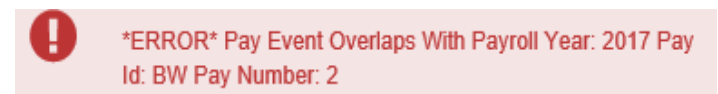


Figure 4 Red - Error

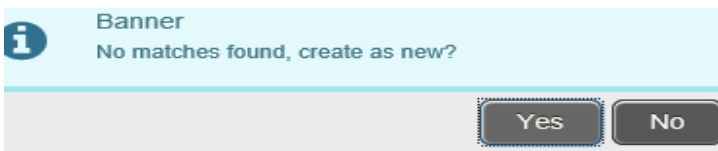
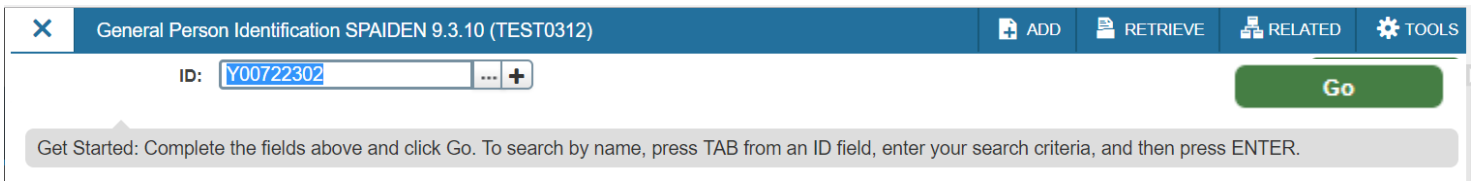


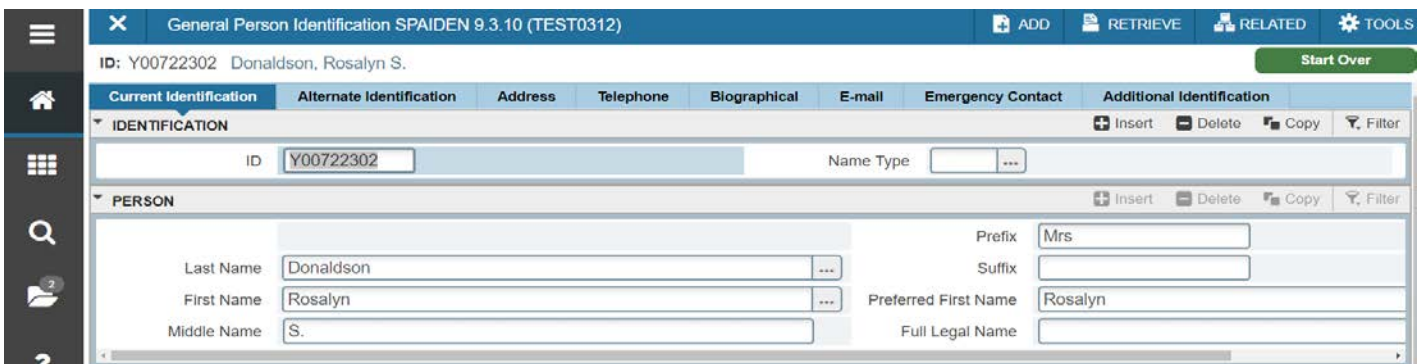
Figure 5 Informational Message

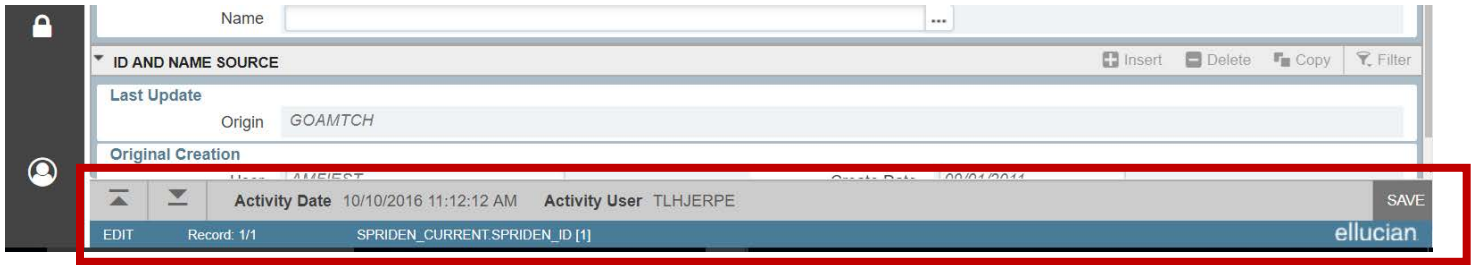
Familiar concepts

Key block is also called the **Page Header**. Click **Go** or **Click Alt+PgDn** on the right of the page to view the remainder of the page.



Return to the page header / Return (Roll back) to the key block using the **Start Over** button.





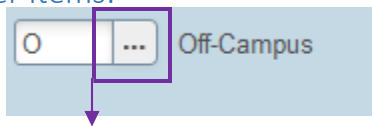
1

2

3

1. Next Section/Previous Sections (Next block/Previous Block equivalent) – arrows at bottom to go up and down. Use **Alt+PgDn** or **Alt+PgUp** to navigate using the keyboard.
2. Record counts
3. Save Button – Commit (F10)

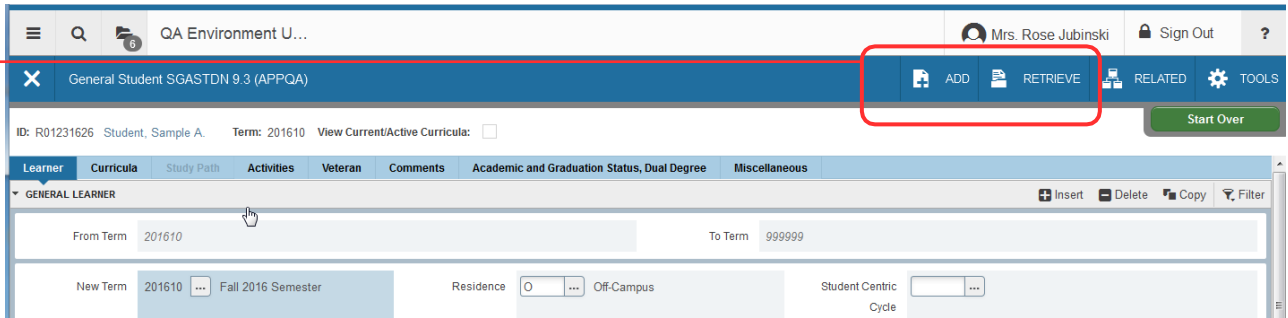
Other Items:



Look-up: 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.



Pagination Controls: Data can be viewed one record at a time or in a grid. 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). **Please note:** go to TSAAREV or TGACSPV to view a sample of pagination controls.



Banner Document Management:

- Use the **ADD** button to upload to imaging
- use the **RETRIEVE** button to display the corresponding Imaging documents

Sections on pages

Expand or hide sections of the page by clicking the arrow to the right of the section title.

General Person Identification SPAIDEN 9.3.10 (TEST0312)

ID: Y00722302 Donaldson, Rosalyn S. Start Over

Current Identification | Alternate Identification | Address | Telephone | Biographical | E-mail | Emergency Contact | Additional Identification

IDENTIFICATION + Insert - Delete + Copy 🔍 Filter

ID: Y00722302 Name Type: [] ...

PERSON + Insert - Delete + Copy 🔍 Filter

Last Name: Donaldson Prefix: Mrs
First Name: Rosalyn Suffix: []
Middle Name: S. Preferred First Name: Rosalyn
Full Legal Name: []

NON-PERSON + Insert - Delete + Copy 🔍 Filter

Name: [] ...

Related Menu

Related Menu: displays a list of pages that can be accessed from this page.

General Student SGASTDN 9.3.9 (TEST0312)

ID: Y00722302 Student Summary
Donaldson, Rosalyn S.
Term: [] View Current/Active:
Curricula

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search

Search

- Student Mail [SUAMAIL]
- All Learner Curricula [SOILCUR]
- Graduation Application [SHAGAPP]
- Degrees and Awards [SHADEGR]
- Assign Advisors to Student [SGAADVR]
- Student Cohorts and Attributes [SGASADD]
- High School Information [SOAHSCH]
- Prior College Information [SOAPCOL]
- Sports Participation by Term [SGASPRPT]

Sorting

You may sort column by clicking on the column header.

Major Code *	Description *	CIPC	Major	Minor	Concentration	Occupation	Financial Aid Eligibility	Voice Response Message Num
079B	AYA Integrated Languag...	131305	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
079A	AYA Integrated Mathema...	131311	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
079D	AYA Integrated Science	131316	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
079C	AYA Integrated Social St...	131318	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0298	Accountancy	520301	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
M063	Accounting	520301	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
0300	Accounting	520301	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0T01	Accounting	520301	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0356	Accounting Technology	520301	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0900	Accounting Technology	520301	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0301	Accounting and Finance	520304	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
M111	Actuarial Science	450601	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
071H	Adolescent and Young A...	131205	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0G24	Adu Gero Acute Care Nu...	513805	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
0687	Adu Gero Acute Care Nu...	513814	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
0310	Adv and Public Relations	090903	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

QuickFlow

QuickFlows are an established group of pages which display one after the other upon closing the page. QuickFlows are activated by using the **GUAQFLW** form. Enter GUAQFLW in the search menu. Type the name of your established QuickFlow in the entry field. If you are unfamiliar with the name of the QuickFlow, search to find a name. See *How to Create a Quick Flow* document for more details on creating and searching for a QuickFlow.

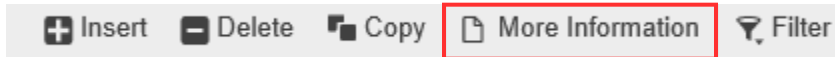
QuickFlow Form GUAQFLW 9.0 (TEST0312)

QuickFlow ...

Description

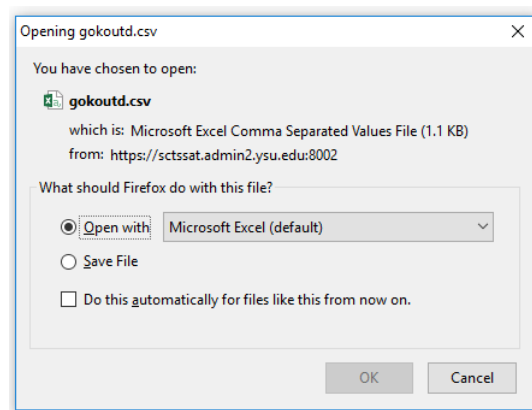
1. Type the name of the QuickFlow in the QuickFlow field. If the QuickFlow name is unknown, search to find a quick flow by click the search icon near the entry field
2. Click the **Start** button.

Supplemental Data Engine



Data Extract

This feature is available on most forms to pull data into an excel file. Once you have the data on form, Click **Export** under TOOLS, you can either Open or SAVE and your information will display in EXCEL.



	A	B	C	D	E	F
1	ZIP or Postal Code	City	County	State or P	Nation	Activity Date
2	14174	Youngstown	NY063	NY		23-Feb-15
3	15696	Youngstown	PA129	PA		23-Feb-15
4	32466	Youngstown	FL005	FL		23-Feb-15
5	44501	Youngstown	OH099	OH		23-Feb-15
6	44502	Youngstown	OH099	OH		23-Feb-15
7	44503	Youngstown	OH099	OH		23-Feb-15
8	44504	Youngstown	OH099	OH		23-Feb-15

Figure 6 Sample Excel sheet

Conclusion

Banner 8 will be phased out of use by the end of 2018. Please take every opportunity to learn Banner 9 Navigation.

Additional Banner 9 Documents:

- Banner 9 Website: <http://cms.ysu.edu/administrative-offices/human-resources/banner-9>

Contact

Contact IT Service Desk & Training at x3041 or visit the
[Training Website](http://cms.ysu.edu/hrtraining).
cms.ysu.edu/hrtraining