



EASTERN
WASHINGTON UNIVERSITY

Banner 9 – Basic Navigation

User's Guide

September 2018

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WELCOME TO BANNER BASIC NAVIGATION

Welcome to the *Banner 9-Basic Navigation User's Guide*. This guide is designed to provide you with the information needed to successfully access and navigate in Banner and includes the following topics:

- **Accessing Banner**
- **Navigating in Banner**
- **Display Options**
- **Bookmarking Using My Banner**
- **Keyboard Shortcuts**

WHAT IS BANNER?

Banner is an administrative suite of integrated applications used to run the information systems used by the University. Banner allows the integration of data between Student, Finance, Human Resources, and Advancement systems. Banner is a web-based application, accessible using internet browsers.

The previous version of Banner was Banner INB. The current version of Banner is Banner AppNav (Application Navigator) or Banner 9.

Note: To access Banner off campus, a VPN (virtual private network) connection with the EWU network or remote desktop must be established. Contact the Help Desk at 359-2247 or visit <https://sites.ewu.edu/it/services/access-passwords-storage/vpn/> to set up a VPN connection.

EWU uses the following Banner modules:

- Banner Student
- Financial Aid
- Banner Finance
- Banner Human Resources/Payroll

FEATURES & BENEFITS

The Banner 9 Welcome screen offers a modern web page interface for navigating throughout Banner pages, offering multiple ways to search. for navigating throughout Banner Admin pages, offering multiple ways to search.

- Reorganization of the Banner Administrative menu.
- Banner Admin pages are transformed into web page-like versions of INB forms.
- Mobile device compatible.
- Internet based and with full browser support.

OBTAINING BANNER ACCESS

The University currently has three user access levels: Student, Finance, and Financial Aid. The ability to view, access, and edit data vary with each access level.

For Student and Financial Aid access:

- Enroll and complete the *Banner 100-Basic Navigation* course. Sign up for the course from the Training Scheduler at <https://web.ewu.edu/trainsched/>. Complete and return the Banner 100-Basic Navigation exam.
- Submit the Banner Student Access form found on the Banner Help website at <https://sites.ewu.edu/it/services/training-development/banner-help/>.

For Finance access:

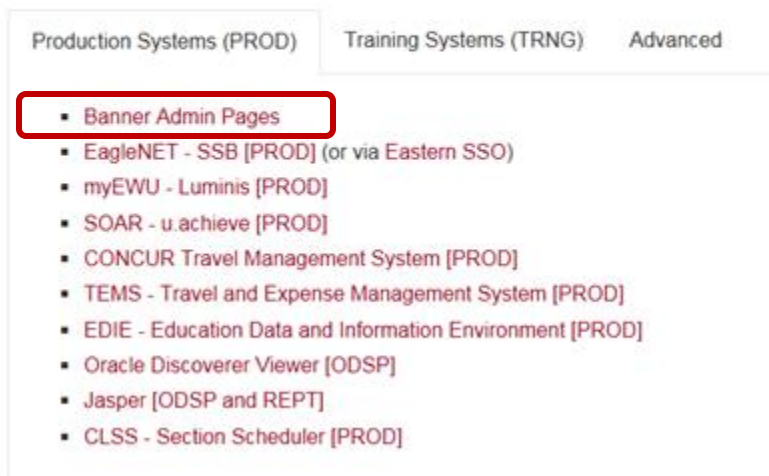
- Enroll and complete the *Banner 100-Basic Navigation* course. Sign up for the course from the on-line Training Scheduler at <https://web.ewu.edu/trainsched/>. Complete and return the Banner 100-Basic Navigation exam.
- Enroll and complete the *Banner Finance 201-Introduction to Finance* course. Sign up for the course from the online Training Scheduler found at <https://web.ewu.edu/trainsched/>.
- Submit the Banner Finance Access security form found at <https://sites.ewu.edu/hr/files/2017/10/Banner-Finance-Access-Request-Form.pdf>

LOGGING INTO BANNER

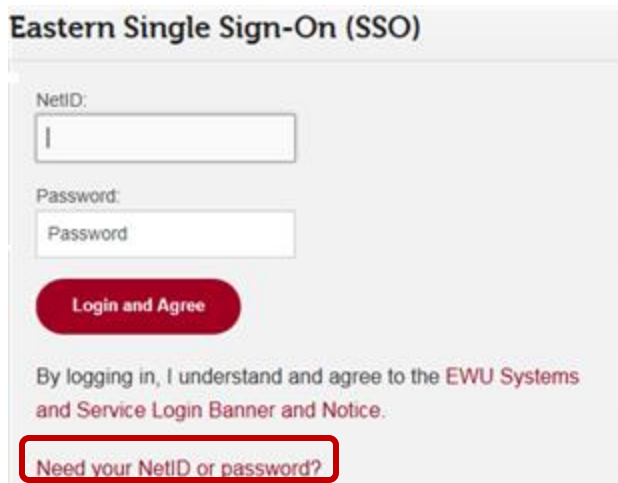
The following provides instructions on accessing Banner:

1. Launch any web browser. Access the **Banner Secure Links** page: <https://sites.ewu.edu/it/services/administrative-information-systems/banner/>

Banner Secure Links



2. Select **Banner Admin Pages**.
3. If you are not already logged in via single sign-on, enter your NetID user name (this is typically your first initial and last name; for example "dmiller"). Enter your **Password** and click the **Login and Agree** button.

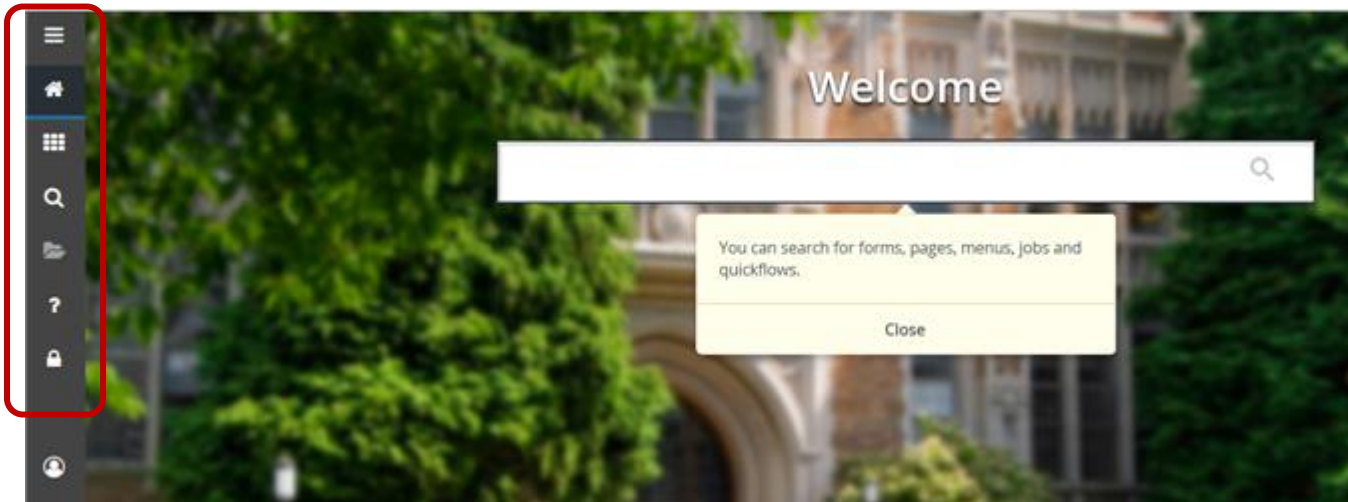


The image shows the Eastern Single Sign-On (SSO) login interface. It features a title 'Eastern Single Sign-On (SSO)' at the top. Below the title are two input fields: 'NetID:' and 'Password:'. The 'NetID' field contains the letter 'I'. Below these fields is a red button labeled 'Login and Agree'. Under the button, there is a line of text: 'By logging in, I understand and agree to the EWU Systems and Service Login Banner and Notice.' At the bottom of the form, there is a red-bordered box containing the text 'Need your NetID or password?'.








- If you do not know your password click the **Need your NetID or password** on the Eastern Single Sign-on page, or contact the Help Desk at 359-2247.

BANNER LANDING PAGE/DASHBOARD

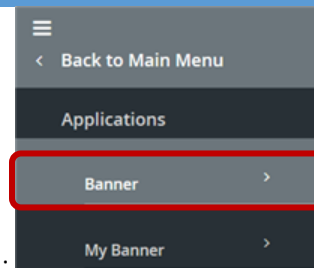
After logging in, the Banner landing page displays. Menus, pages, and modules are selected from this screen using the search feature or icons in the left-hand column.




1. The landing page provides the following icons that are used to navigate Banner. The icons display continuously regardless of the page displayed.

	Menu Icon	The Menu icon is used to fully display the names of the icons in the main menu.
	Dashboard Icon	The Dashboard icon returns to the landing page.
	Applications Icon	The Applications icon displays the Banner menu and My Banner. The Banner menu is used to navigate Banner modules and pages.
	Search Icon	This icon opens the search feature in the main menu. Partial or full page name (i.e, FGIBDST) or description (Organization Budget Status) may be used to search Banner.
	Recently Opened	This icon is used to display recently opened pages. This list clears when you log out of Banner.
	Help	Provides page-based online help and assistance. You must be on a page to access help.
	Sign Out Icon	Used to sign out of Banner.

NAVIGATING BANNER – MAIN MENU



1. Click the **Applications** icon  to display the navigation menu:
2. Click the **Banner** link to open the menu:




- The Banner menu contains subfolders, the modules, and the available pages based on the module selected (Student, Finance System, etc.).

Click the desired module to open the menu and drill down to the desired page.

DIRECT NAVIGATION

If you know the page name or page description, use the **Search** field on the landing page or the **Search** icon.

Search Icon 	This icon opens the search feature in the main menu. Partial or full page name (i.e, FGIBDST) or description (Organization Budget Status) may be used to search Banner.
---	---

BANNER SHORT CUTS

Banner 9 has a set of keyboard shortcuts on the landing page, which you can review by clicking on **Keyboard Shortcuts** in the bottom

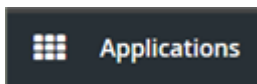
right corner of the page: . Please see Appendix A for a full list of keyboard shortcuts.

To control the screen size use the following keyboard short cuts: screen zoom: CTRL = (increase), CTRL – (decrease), CTRL 0 (reset to 100%).

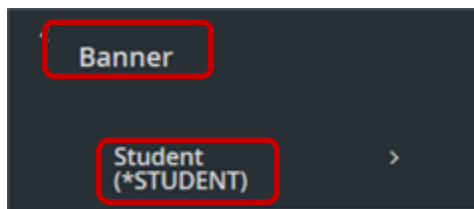
BANNER PAGES

A Banner page is used to view, access, and edit information in the database. The pages available for each user depends on the user access level. The access level determines the ability to view, edit and update pages. The following provides steps to navigate a Student page.

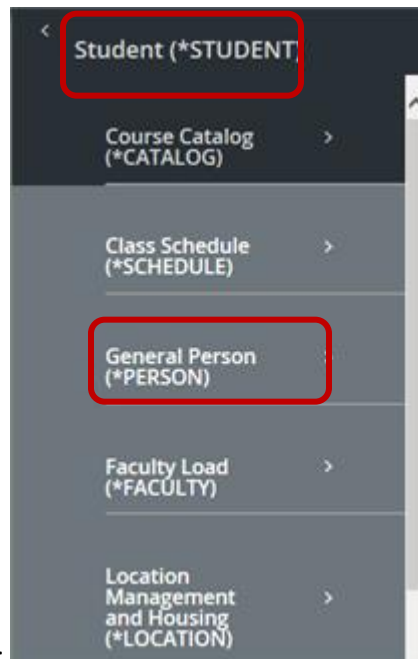
1. Click the Applications icon:



2. Select **Banner** and the desired system (for example; **Student (*STUDENT)** or **Finance System Menu (*FINANCE)** etc.).

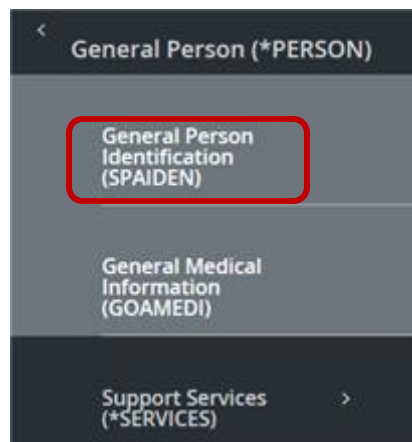


3. Drill down in the desired menu to locate the applicable page.



➤ The **Student** menu displays:

4. Select the **General Person** sub-menu. Select **General Person Identification (SPAIDEN)**.



➤ The **General Person Identification (SPAIDEN)** page displays.

PAGE FEATURES

When a page is accessed, there are several features, icons, and keys available for navigating in the page. The following features are used to navigate page.

PAGE HEADER



The page header is part of the basic navigation and contains the following items from left to right:

- **Page close icon "X"** – Always use this icon to close the page.

- **Page Title** – Includes the page description, 7-character page name, Banner version, and database.
- **Add** – Not used at this time.
- **Retrieve** – Not used at this time.
- **Related Menu button** – Displays a list of related pages that can be accessed from this page.
- **Tools Menu** – Includes refresh, export, print, clear record, clear data, item properties, and other options controlled by the page. For additional information on the **Tools** menu, refer to the section in this Guide.
- **Notification Center** – Located to the right of the **Tools Menu** and displays system messages and information as needed: successful save of data, warning messages, error messages, informational messages, number of messages to be corrected to continue in the page. For additional information on the **Notification Center**, refer to the section in this Guide.

KEY BLOCK

The screenshot shows the 'Organization Budget Status FGIBDST 9.3.6 (PPRD)' window. The key block search criteria are as follows:

- Chart:** * [Field]
- Index:** [Field]
- Fiscal Year:** * 19 [Field]
- Query Specific:** * [Field]
- Account:** [Field]
- Commit Type:** Both [Dropdown]
- Include Revenue:** ☒
- Accounts:**
 - Organization:** [Field]
 - Program:** [Field]
 - Account Type:** [Field]
 - Location:** [Field]
- Fund:** [Field]
- Account:** [Field]
- Activity:** [Field]

At the bottom, a green **Go** button is visible. A status bar at the bottom reads: 'Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.'

The first block on most pages contains a key block. 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 what is entered in the key block field(s). 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.

To retrieve and display the information based on what is entered in the key block, click the **Go** button:

Go

To return to the key block and restart, click **Start Over**:

Start Over

SECTIONS

The screenshot displays the Banner 9 SPAIDEN 9.3.11 (PPRD) interface. At the top, there's a header bar with a close button, the title 'General Person Identification SPAIDEN 9.3.11 (PPRD)', and buttons for ADD, RETRIEVE, RELATED, and TOOLS. Below this, a status bar shows 'ID: 00043344 Tester, Gretchen R. Confidential' and a 'Start Over' button. The main content area is divided into several sections, each with a header and a list of fields. The sections are: IDENTIFICATION (with fields for ID and Name Type), PERSON (with fields for Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name), NON-PERSON (with a Name field), and ID AND NAME SOURCE (with fields for Last Update, Origin, Original Creation, and User). Each section has a red bracket on the left side of its header, indicating it can be expanded or collapsed. Additionally, each section has a red box on the right side containing icons for Insert, Delete, Copy, and Filter.

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. 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 may 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.
- **More Information** – *This icon displays if supplemental data can be entered for the record.* The icon is displayed with a check mark if supplemental data already exists for the record.
- **Filter** – Use this to filter records in the section.

BOTTOM SECTION NAVIGATION

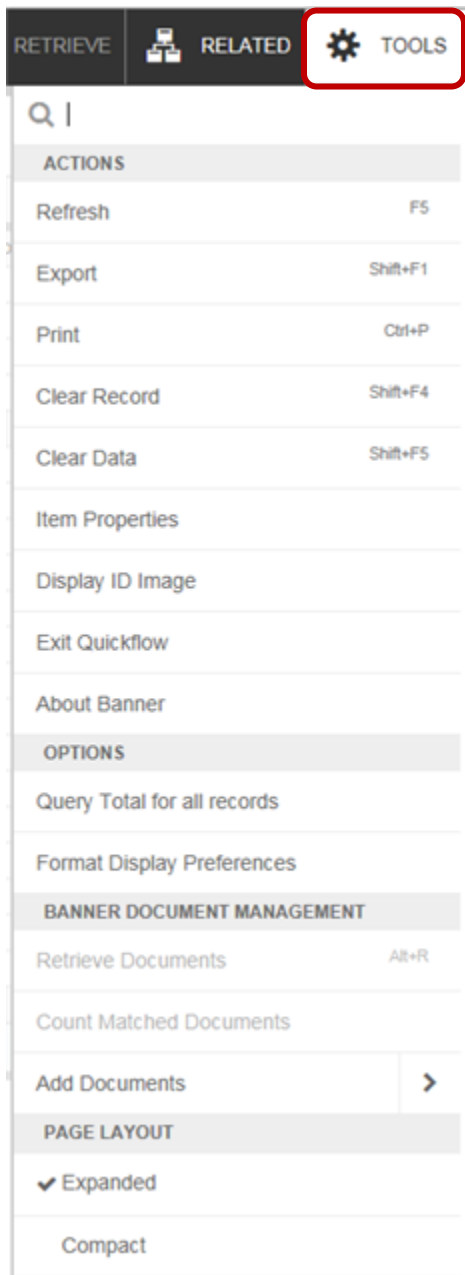
The screenshot shows the bottom section navigation bar. It includes a 'Save' button on the right. On the left, there are icons for navigation (back, forward, search, etc.). In the center, there are labels for 'Activity Date' (01/11/2008 07:37:05 AM) and 'Activity User' (BMORGAN). Below these, there is a label 'Record: 1/1' and a label 'SPRIDEN_CURRENT SPRIDEN_ID [1]'. The name 'ellucian' is visible in the bottom right corner.

The bottom of the section of the page contains icons to be used for navigation, perform functions, and display additional information.

- **Previous Section** – Moves backwards in the sections (Alt+ Page Up).
- **Next Section** – Moves to the next section of the page (Alt+ Page Down).
- **Activity Date** – Current system time. This displays the time stamped for the record if created or modified.
- **Activity User** – Name of account user creating or modifying the record.
- **Save** – Saves any data added or modified.

TOOLS

Tools allow additional actions, options, or page layout selections. To view Tools, click **Tools** in the top right-hand corner. Please note: **Banner Document Management** is not used at this time.



RELATED

The **Related** option is used to display additional related pages, based on the page displayed. To view related pages, click on **Related** in the top right hand side.

Banner 9 Basic Navigation Guide

Organization Budget Status FGIBDST 9.3.6 (PPRD)										ADD	RETRIEVE	RELATED	TOOLS
Chart: E Eastern Washington University Fiscal Year: 09 Index: 200307 Lab Services Query Specific Account: Include Revenue Accounts: Commit Type: Both													
Organization: 71000 Enterprise Systems Management Fund: 135145 Lab Services Program: 30100 Academic Support-Spons Prog & Res Account: Account Type: Activity: Location:													
* ORGANIZATION BUDGET STATUS													
Account		Type	Title	Adjusted Budget	YTD Activity	Commitments							
700		E	Direct Expense		28,944.00	0.00							
71213		E	Purchased Services-General		0.00	1,818.43							
71400		E	Supplies		0.00	24,613.39							
71441		E	Repairs-Equipment		0.00	1,818.50							
				Net Total	28,944.00	28,250.32							
14 < (T) of 1 > 10 * Per Page													

Search

Budget Summary Information [FGIBSUM]
Shift+F2

Organization Encumbrances [FGIOENC]
F4

Transaction Detail Information [FGITRND]
F3

RESORT OR MOVE COLUMNS

SORT ORDER

In a grid layout, values for a field can be sorted. An up or down arrow next to the field name indicates the current sort order for the field. Click the field label to reverse the sort order.

Account	Organization	Program	Field	Amount
71400	71000	30100	YTD	-701.24

MOVE COLUMNS

Some pages allow columns to be moved. Click the desired column and drag and drop to the desired location:

Note: Some columns are locked and cannot be moved.

DETAIL TRANSACTION ACTIVITY													Insert	Delete	Copy	Filter
Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Type	Document *	Transaction Date *	Activity Date *	Description	Commit Type	Fund *	Activity	Location		
57300	71000	30100	YTD	10.00	+	MSC	F0012473	04/13/2009	04/13/2009	JFK MARS LAB	U	135145				
57300	71000	30100	YTD	20.00	+	MSC	F0012307	04/03/2009	04/06/2009	JFK MARS LAB	U	135145				
57300	71000	30100	YTD	16.00	+	MSC	F0008944	12/09/2008	12/08/2008	JFK MARS LAB	U	135145				
57300	71000	30100	YTD	9.00	+	MSC	F0008893	11/26/2008	11/26/2008	JFK MARS LAB	U	135145				

DETAIL TRANSACTION ACTIVITY													Insert	Delete	Copy	Filter
Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Type	Document *	Transaction Date *	Activity Date *	Description	Commit Type	Fund *	Activity	Location		
57300	71000	30100	YTD	10.00	+	MSC	F0012473	04/13/2009	04/14/2009	JFK MARS LAB	U	135145				
57300	71000	30100	YTD	20.00	+	MSC	F0012307	04/03/2009	04/06/2009	JFK MARS LAB	U	135145				
57300	71000	30100	YTD	16.00	+	MSC	F0008944	12/09/2008	12/08/2008	JFK MARS LAB	U	135145				
57300	71000	30100	YTD	9.00	+	MSC	F0008893	11/26/2008	11/26/2008	JFK MARS LAB	U	135145				

NOTIFICATION CENTER MESSAGES

Various message notification types may display when working in Banner 9. The **Notification Center** is located on the top right hand



side next to **Tools** only if a notification is displayed. To clear the notification click on the number to toggle off.

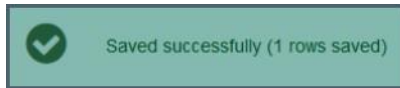
- **Error Notification** – Displays a “!” in a circle when message is displayed.



- **Info Notification** – Displays an “i” in a circle when a message is displayed. May display an OK button that you must select to continue.



- **Success Notification** – Displays a checkmark in a circle when a message is displayed.

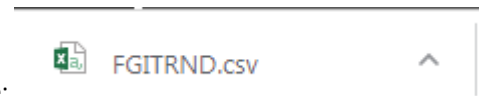
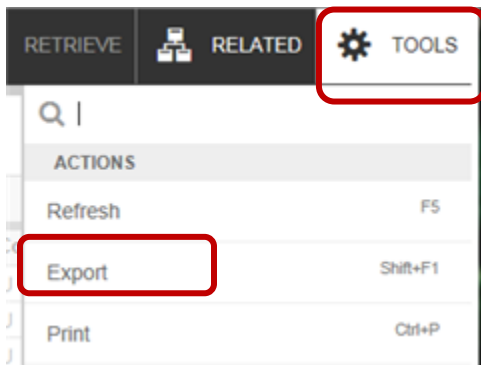


- **Warning Notification** – Displays a “!” in a yield sign when a message is displayed.



EXPORT TO EXCEL

Data may be exported to Excel. From the desired page, click **Tools** in the top right-hand corner. Select **Export** from the list:



Depending on the browser used a download option displays at the bottom on the page:
Click or select to open.

Click the Excel icon in the system tray to open the file if Excel does not automatically open:



DATA DISPLAY OPTIONS

REQUIRED FIELDS

An asterisk (*) displayed next to a field name indicates that the field requires a value. If you leave a section or a page without entering information in a required field, an error message displays in the Notification Center.

DATES

Dates can be entered directly or use the calendar icon. The date format is mmddyyyy. To enter the current date, type any letter and [TAB].

PAGE DISPLAY OPTIONS

The default view is typically compact. To change the view, click **Tools** in the top right-hand corner. In the Page Layout section, select either **Compact** or **Expand**:

The screenshot shows the Banner 9 interface. At the top, there is a header bar with navigation icons: ADD, RETRIEVE, RELATED, and TOOLS. The TOOLS icon is highlighted with a red box. Below the header, there is a search bar and a list of actions: Refresh, Export, Print, Clear Record, Clear Data, Item Properties, Display ID Image, Exit Quickflow, About Banner, and BANNER DOCUMENT MANAGEMENT. The BANNER DOCUMENT MANAGEMENT section is expanded, showing options: Retrieve Documents, Count Matched Documents, and PAGE LAYOUT. The PAGE LAYOUT section is also expanded, showing options: Expanded and Compact. The Compact option is selected and highlighted with a red box.

Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Type	Document *	Transaction Date *	Description	Activity Date *	Co
57300	71000	30100	YTD	10.00	+	MSC	F0012473	04/13/2009	JFK MARS LAB	04/14/2009	U
57300	71000	30100	YTD	20.00	+	MSC	F0012307	04/03/2009	JFK MARS LAB	04/06/2009	U
57300	71000	30100	YTD	16.00	+	MSC	F0008944	12/09/2008	JFK MARS LAB	12/09/2008	U
57300	71000	30100	YTD	9.00	+	MSC	F0009893	11/26/2008	JFK MARS LAB	11/26/2008	U
57300	71000	30100	YTD	10.00	+	MSC	F0008310	09/30/2008	JFK MARS LAB	09/30/2008	U
57300	71000	30100	YTD	20.00	+	MSC	F0006991	08/22/2008	JFK MARS LAB	08/22/2008	U
57312	71000	30100	YTD	0.65	+	JE16	J0004421	05/31/2009	TR LIBR LOST BOOK FINE	06/05/2009	U
57312	71000	30100	YTD	-0.65	-	MSC	F0006717	07/09/2008	JFK MARS LAB BILLED ITEM	07/09/2008	U
580	71000	30100	OBD	26,312.00	+	BD01	L0000005	07/01/2008	FY2009 Original Budget	07/01/2008	U
58100	71000	30100	YTD	14.00	+	JE16	J0004822	06/30/2009	MARS LAB PROCESSING	07/14/2009	U
58100	71000	30100	YTD	190.86	+	JE16	J0004822	06/30/2009	EC CHIP ACTIVITY 3/30/09-6/22/09	07/14/2009	U
58100	71000	30100	YTD	2,916.50	+	JE16	J0004822	06/30/2009	FY09 MATERIALS CHARGEBACK	07/14/2009	U
58100	71000	30100	YTD	3,579.08	+	JE16	J0004716	06/30/2009	JUN 09 TR UNIPRINT	07/09/2009	U
58100	71000	30100	YTD	1,791.30	+	JE16	J0004598	06/25/2009	MARS LAB PROCESSING	07/09/2009	U
58100	71000	30100	YTD	378.45	+	JE16	J0004483	06/15/2009	MARS LAB PROCESSING	06/15/2009	U
58100	71000	30100	YTD	12.00	+	MSC	F0013161	06/10/2009	Mars Lab/Navar, Nancy	06/11/2009	U
58100	71000	30100	YTD	-0.65	-	JE16	J0004421	05/31/2009	TR LIBR LOST BOOK FINE	06/05/2009	U
58100	71000	30100	YTD	2,956.09	+	JE16	J0004408	05/31/2009	MAY 09 TR UNIPRINT	06/05/2009	U
58100	71000	30100	YTD	42.00	+	MSC	F0013096	06/02/2009	305393ELENA NIKONCHUKLAMENATI	06/03/2009	U
58100	71000	30100	YTD	71.00	+	JE16	J0004326	05/22/2009	MARS LAB PROCESSING	05/22/2009	U
Total				118,732.40	+						

LOOKUP

The Lookup feature is used to quickly find a value for a field. The **Lookup** button (...) next to a field indicates that the field has the

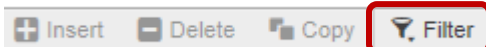
ID: ...

lookup feature:

Click the **Lookup** button (...), enter a value, and press **Enter** to display results that match the filter criteria (if applicable). Select a value and click **OK**, or double-click a value to return the value to the calling page.

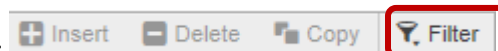
FILTERING DATA

There are multiple ways to filter data depending on the page and field available. Data may be filtered if the **Filter** icon is displayed in the header or section:



Use the following steps to filter data in a section.

1. Click the **Filter** (or F7) icon for the section:



- Choose the desired field or select another field (if applicable) from the **Add Another Field** drop down list.
- Enter a value for the field you selected.

Optional: Some pages automatically offer additional filter options. Choose a desired field or select an additional field from the **Add Another Field** dropdown, select the desired field, and enter a value for the field:

When all filter criteria are entered, click **Go** or (F8) to 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 or descending order by clicking on the field label in the column header. You can reverse the sort order by clicking the field label.

WILDCARDS IN BANNER

Two wildcard characters are used in Banner: the percent sign "%" and an underscore "_". Wildcards are used to fill in unknown characters in a page name or a search criterion. The search results returned depends on the number of items that satisfy the search criteria.

WILDCARD	FUNCTION
%	The percent sign wildcard is used when one or more consecutive characters are unknown. For example, when searching for a page, <i>FGI%</i> will result in a list of all pages that begin with the letters FGI such as FGIBAVL, FGIENCD, FGITRND, etc.
_	The underscore wildcard is used when a single character is unknown. For example, a search using <i>FGI_AVL</i> returns FGIBAVL (this is the only page that satisfies the search).

USING THE % WILDCARD

When utilizing the lookup option you may perform either exact match lookups or partial match lookups when some of the information is unknown. To perform a partial match lookup, use a "%" to replace the unknown information.

- Select the lookup icon (...):
- Enter a partial value followed by % in the desired field:

PERSON SEARCH

Basic Filter Advanced Filter

ID Last Name First Name Middle Name Change Indicator Add Another Field ...

Fourn%

Clear All Go

1. Click **Go** or press F8.

The results of the query using the wildcard (%) yield any names that match the partial information entered.

USING THE _ WILDCARD


The underscore is used to replace a single unknown character.

1. From the **Search** field, enter the known values and an underscore (_) for the unknown character.

fgi_rnd

Detail Transaction Activity (FGITRND)

BANNER ONLINE HELP

Online help is available from any page. Access the desired page and click the **Help** icon in the left-hand column: . A new browser window opens with help information specific to the page. If desired, the page can be printed. Click the **Printer** icon in the top right-hand side to print.

ellucian Banner Student Online Help

Search

Content

- Emergency Contact (SPAEMRG) page
- General Person Identification (SPAIDEN) page
 - Main window
 - Alternate Identification window
 - Address Information window
 - Telephone window
 - Biographical window
 - Email window
 - Emergency Contact window
 - Additional Identification window
- General Person (SPAPERS) form
- General Person Telephone (SPATELE) page
- Electronic Prospects Default Options (SRAPRED) page
- Electronic Prospect Detail (SRAPREL) page
- Quick Recruit (SRAQUIK) page
- Recruiter Appointments/Visits (SRARAPT) page
- Recruit Prospect Information (SRARECR) page
- Recruiter Integration Curriculum Crosswalk (SRARICC) page
- Recruiter's Prospect (SRARINF) page
- Recruiter Integration Test Code Crosswalk (SRARITC) page
- Source Visits/Prospects (SRASRCE) page
- Prospect Summary (SRASUMI) page
- Tape Field Position Rule (SRATPFD) page
- Tape File Test Score Controls (SRATPTS) page
- Web for Prospects Acknowledgement Letter (SRAWACK)

General Person Identification (SPAIDEN) page

Use the General Person Identification page to capture biographic/demographic information for all persons/non-persons associated with the institution.

Persons/non-persons may belong to any or all of the installed applications (Banner Student, Banner Finance, etc.). All persons/non-persons are first entered into the database using this page. The information maintained in this page is specific to the person/non-person and does not relate to the person's/non-person's involvement at the institution. All other modules/applications are dependent on the information captured and maintained in this page. Any changes or additions to a person's/non-person's biographic/demographic information must be made in this page.

You can access the Common Matching Entry (GOAMTCH) page from SPAIDEN to enter information for a new ID and then execute the matching process before a new PIDM is created in Banner®. To do this, turn on Common Matching for the institution using the **OnlineMatching Process Enabled (Indicator)** on GUAINST. In addition, the user attempting to access GOAMTCH must not have been excluded from using it on GORCMUS. If user has been excluded from Common Matching on GORCMUS, the user can access GOAMTCH from the Banner menu system.

To open GOAMTCH from SPAIDEN: enter **GENERATED** in the ID field, select the **Generate ID** button, or enter an ID in the ID field that does not exist in Banner. The GOAMTCH page will automatically be displayed. If a person record is created using only the GOAMTCH page, the **Origin** field (on SPAIDEN and SPRIDEN) will be set to GOAMTCH. If the person record is created using SRRSRIN or SRIPREL, then the **Origin** field will be set to SRKPREL.

You can search on person last and first names and non-person names by text to see if similar names exist. Use the **Search** feature from the **LastName** and **First Name** fields to view similar names on the Person Search (SOAIDEN) page. Use the **Search** feature from the Non-Person Name Information **Name** field to view similar names on the Non-Person Search (SOACOMP) page.

You can view the user ID and the page or process which created that name/ID record in the ID and Name Source section.

Main window
The main window contains the key block and the Current Identification section.

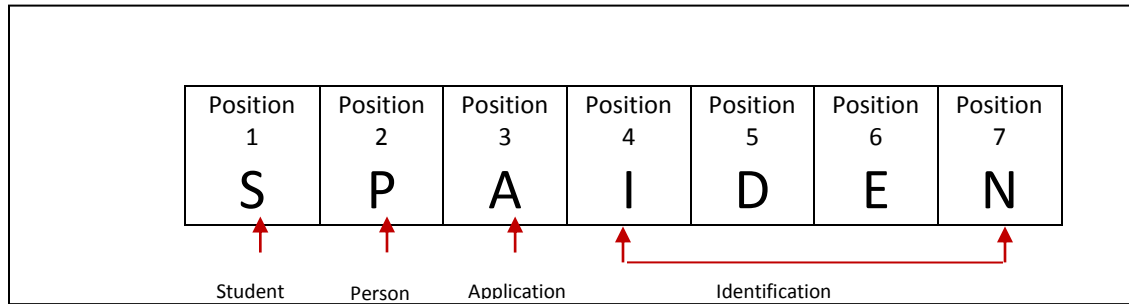
Alternate Identification window
Use this window to enter or change information for an alternate ID and name.

Address Information window
Use this window to enter address and delivery information for the person.

You may also use the scroll bar in the left-hand column of page names to view help for additional pages.

PAGE NAMES IN BANNER

Every Banner page has an abbreviated seven character page name. Pages can be referred to based on their page description or from the seven character page name. In the example below, the page is referred to as the “**SPAIDEN**” page or the **General Person Identification** page. The seven characters are located in positions one through seven.



POSITION 1 - Identifies the Banner product owning the page, report, process, or table. The boldface text in the table below represents the Banner products used at EWU.

Position 1 for Banner Products			
F	Finance	R	Financial Aid
G	General	S	Student
S	Banner Security	H	Human Resources

POSITION 2 - Identifies the application module owning the page, report, process or table. Unique to the product identified in position 1.

Position 2 for Banner Financial Aid	
A	Applicant Processing
B	Budgeting
C	Record Creation
E	Electronic Data Exchange
F	Funds Management
H	History and Transcripts
J	Student Employment
L	Logging
N	Need Analysis
O	Common Functions
P	Packaging and Disbursements
R	Requirements Tracking
S	Student System Shared Data
T	Validation page/table
U	Utility

Position 2 for Banner Student	
A	Admissions
C	Catalog
E	Support Services
F	Registration/Fee Assessment
G	General Student
H	Grades/Academic History
I	Faculty Load
K	Reserved for SCT International
L	Location Management
M	CAPP
O	Overall
P	Person
R	Recruiting
S	Schedule
T	Validation page/table
U	Utility

Position 2 for Banner General		Position 2 for Banner Finance	
E	Event Management	A	Accounts Payable
J	Job Submission	B	Budget and Position Control
L	Letter Generation	F	Fixed Assets
O	Overall	G	General Ledger
P	Purge	O	Finance Operations
S	Security	P	Purchasing / Procurement
T	Validation page/table	R	Research / Grant & Contract Accounting
U	Utility	T	Validation page/table
X	Cross Product		

POSITION 3 - Identifies the type of page, report, process or table.

Types of pages (also called objects)
<ul style="list-style-type: none"> • Inquiry • Application • Query • Maintenance

POSITION 4 through 7 - Identifies a unique four-character code for the page, report, process or table, typically an abbreviation of the page description. Below is a list of commonly used codes.

** *IDEN	Identification
** *PINC	Position Incumbent
** *STDN	Student Relation
** *PERS	Person
** *BAVL	Budget Availability Status
** *STAT	Status
** *PSWD	Password
** *TRND	Transaction Detail
** *BDST	Organization Budget Status
** *TBAL	Trial Balance
** *GLAC	General Ledger Activity

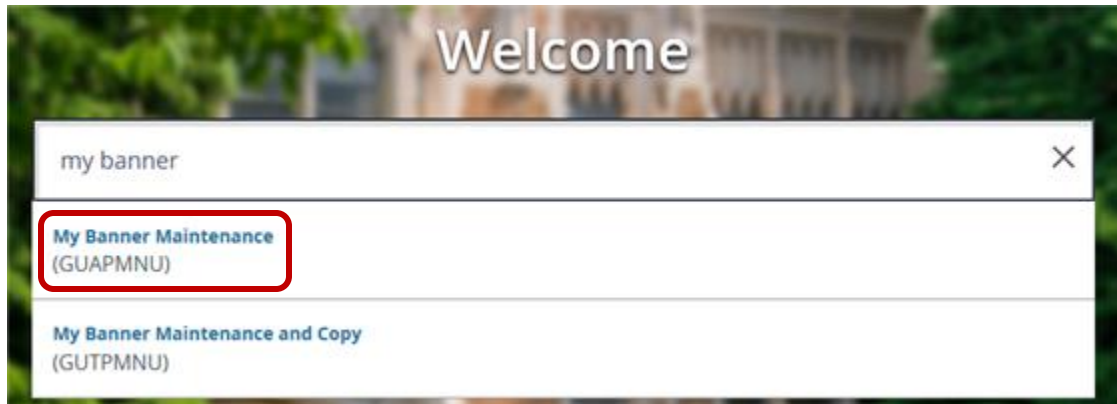
BANNER CUSTOM MENU

The **My Banner** feature is used to “bookmark” frequently used Banner pages. Adding pages to **My Banner** eliminates the need to navigate through menu paths to access frequently used pages. It also eliminates the need to memorize page names or keep a separate written list of frequently accessed pages.

BOOKMARKING PAGES IN MY BANNER

The following provides instructions on adding Banner pages to **My Banner**.

1. From the landing page, type “my banner” in the search field. Select **My Banner Maintenance (GUAPMNU)**.



2. The **My Banner Maintenance** page displays. Confirm the **Type** field displays **Oracle Forms module**:

Type * ▼ ↺

- If **Oracle Forms module** does not display, select it from the drop-down list:

Type * ▼ ↺

Object *	Description *
GUAABOT	About Banner
FTVACCT	Account Code Validation
FGQACTH	Account Hierarchy
FTIACHT	Account Hierarchy Query
FTMACCI	Account Index Code Maintenance
FTVACCI	Account Index Code Validation
FTVATYP	Account Type Validation
TOQMENU	Accounts Receivable Globals
FTVACTV	Activity Code Validation
FOQADDR	Address Information Query
PPIADDR	Address List Inquiry
FTMAGCY	Agency Code Maintenance
FGQAGYH	Agency Hierarchy
FTIAGYH	Agency Hierarchy Query
SSN_SEARCH	Allows you to search by SSN
GLIAPPL	Application Inquiry
FRIAPPL	Application of Payment History Inquiry
FOIAPHT	Approval History
FOIAINP	Approvals Notification
FOIAPPD	Approved Document Query

Object Selection

Object	Description
--------	-------------

Insert Selection
Remove Selection
Insert All
Remove All

Record 1 of 243

3. There are two ways to select pages/queries/menus; search for an object in the list, or query for the desired page.

- **Search the List:** Click any item in the **Object** list or **Description** list (in the left column) to activate the pagination controls at the bottom of the list:

⏪
⏩
1 of 13
20 Per Page
 Record 1 of 243

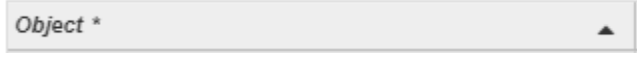
Scroll through the list to find the desired page or object. Double click the desired object or description to select:

Object Type	
Object *	Description *
GUAERRM	Banner Error and Warning Messages
GUAINIT	Banner Global Initialization
FPIBLAR	Blanket Order Activity
FPIBORD	Blanket Order Validation
FGIBAVL	Budget Availability Status
FBIBUDC	Budget Query
GUACALC	Calculator


Click the **Insert Selection** button  to add the object to the **Object Selection** list (the right column). Continue to scroll through the **Object** list or **Description** list

to select additional objects. Once completed, click the **Save** button in the lower right-hand side of the page: 

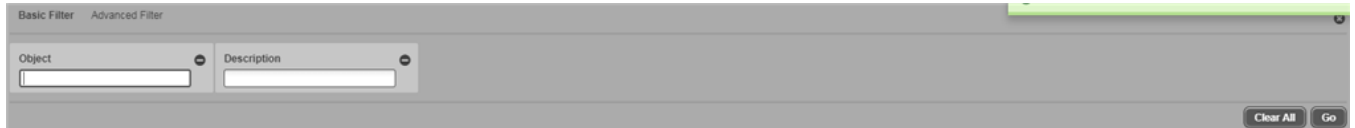
Note: To change the sort order of the **Object** list or **Description** list, click the column header. A sort icon appears:

. Click the arrow to change the sort order.

- **Query:** To query an object name (or partial object name) or object description (or partial object description), click any item in the **Object** list or **Description** list (in the left column) to activate the **Filter** icon:



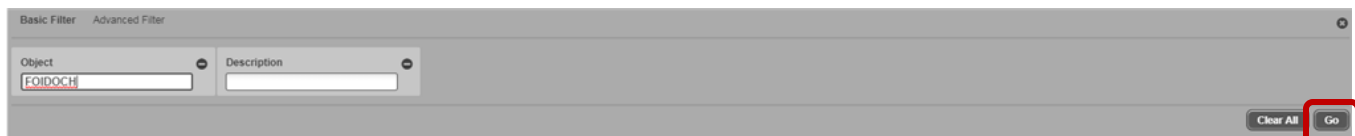
Click the **Filter** icon: . A query section opens at the top of the page:




Enter the 7-character page name (for example FOIDUCH) in the **Object** field, or the page description (for example Document History) in **Description** field and click **Go**:

Important Note: The **Description** field is case-sensitive.

If the full 7-character page name or the page description is not known, use the wild card (%) to search.



Based on the filter criteria, the page(s) displays in the **Object** list. Double click the object or description to select.

Click the **Insert Selection** button  to add the object to the **Object Selection** list (the right column).

Active filters: Object: FOIDDOCH Clear All Filter Again

Type: Oracle Forms module

Object Selection

Object	Description
FOIDDOCH	Document History

Insert Selection


Repeat *all* the steps in this section to continue adding pages. Once completed, click the **Save** button in the lower right-hand side of the page:

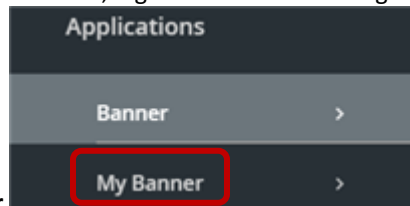
SAVE

Note: If desired, an additional description may be added to items in the **Object Selection** list. Click the applicable object description and type additional text:

Object Selection

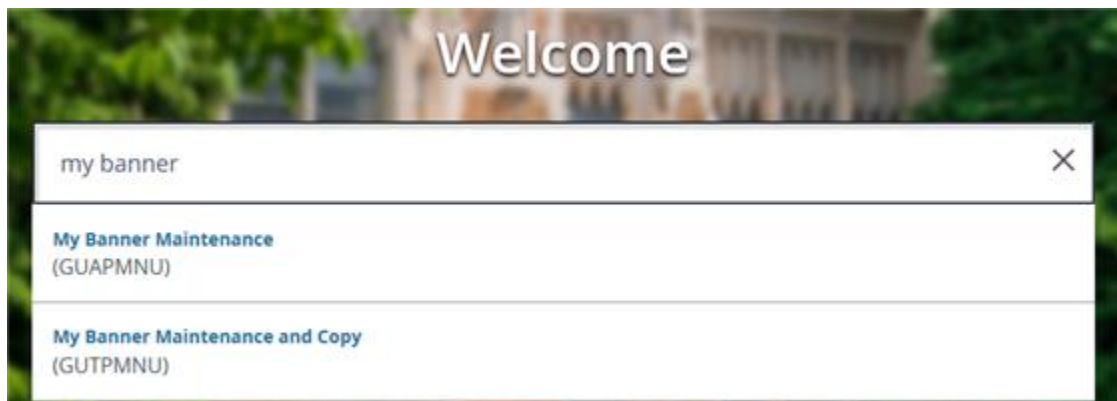
Object	Description
FOIDDOCH	Document History - Online Requisitions
FGIBDST	Organization Budget Status
FGITBAL	General Ledger Trial Balance

4. To view the **My Banner** list, log out of Banner and log back in. Click the **Applications** icon  in the left-hand column.



Select **My Banner**

5. To remove items from **My Banner**, from the landing page, type "my banner" in the search field. Select **My Banner Maintenance (GUAPMNU)**.



6. The **My Banner Maintenance** page displays. Double click to select the applicable item in the **Object Selection** column. Click **Remove Selection**:

The screenshot shows the Banner 9 My Banner Maintenance page. At the top, there is a dropdown menu for 'Type' set to 'Oracle Forms module'. Below this, there are two main sections. The left section is a table with 'Object Type' and 'Description' columns. The right section is an 'Object Selection' table with 'Object' and 'Description' columns. In the 'Object Selection' table, the row for 'FGLTBL' (General Ledger Trial Balance) is highlighted with a red box. Below the 'Object Selection' table, there is a 'Remove Selection' button, also highlighted with a red box.

Object Type	Description *
GUAABOT	About Banner
FTVACCT	Account Code Validation
FGQACTH	Account Hierarchy
FTIACTH	Account Hierarchy Query
FTMACCI	Account Index Code Maintenance
FTVACCI	Account Index Code Validation
FTVATYP	Account Type Validation
TOQMENU	Accounts Receivable Globals
FTVACTV	Activity Code Validation
FOQADDR	Address Information Query

Object Selection	Description
FOIDDOCH	Document History - Online Requisitions
FOIBDST	Organization Budget Status
FGLTBL	General Ledger Trial Balance

Remove Selection

7. Once completed, click the **Save** button in the lower right-hand side of the page:
8. To view the changes in the **My Banner** list, log out of Banner and log back in.

SAVE

APPENDIX A

PC KEYBOARD SHORTCUTS

Action	Banner 9 Key Stroke
Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL+Q
Choose/Submit	ENTER
Clear All in Section	SHIFT+F5
Clear One Record	SHIFT+F4
Clear Page or Start Over	F5
Count Query	SHIFT+F2
Delete Record	SHIFT+F6
Down/Next Record	Down Arrow
Duplicate Item	F3
Duplicate Selected Record	F4
Edit	CTRL+E
Execute Filter Query	F8
Exit	CTRL+Q
Expand/Collapse Drop-down Field	ALT+Down Arrow
Export	SHIFT+F1
First Page	CTRL+Home
Insert/Create Record	F6
Last Page	CTRL+End
List of Values	F9
More Information	CTRL+SHIFT+U
Next Field of Item	TAB
Next Page Down	Page Down
Next Section	ALT+Page Down
Open Menu Directly	CTRL+M
Open Related Menu	ALT+SHIFT+R
Open Tools Menu	ALT+SHIFT+T
Page Tab 1, Page Tab 2, and so on	CTRL+SHIFT+1 CTRL+SHIFT+2, etc.
Previous Field or Item	SHIFT+TAB
Previous Page Up	Page Up
Previous Section	ALT+Page Up
Print	CTRL+P

MAC KEYBOARD SHORTCUTS

Action	Banner 9 Key Stroke
Display Open Items	CTRL + Y
Search	CTRL + Shift + Y
Help	CTRL + Shift + L
Sign Out	CTRL + Shift + F
Open the Main Menu	CTRL + M
Close Main Menu	Ctrl + Alt + M
Open Related Menu	Alt + Shift + R
Open Tools Menu	Alt + Shift + T
GO Button /Choose / Submit/Action	Return/Enter
Next Section	ALT + Page Down
Previous Section	ALT + Page Up
Cancel page, Exit, Close Current Page, Cancel Search or Query	Ctrl + Q
Cancel Action	Esc
Next Field/Item	Tab
Page Tab 1, Page Tab 2, Page Tab 3, ...	CTRL + Shift + 1, CTRL + Shift + 2, CTRL + Shift + 3,
Previous Field/Item	Shift + Tab

BANNER 9 SUPPORT

For additional information and resources, visit the Banner 9 Training and Documentation page:

<https://sites.ewu.edu/it/services/administrative-information-systems/banner/banner-9-upgrade/training-documentation/>

For technical assistance, contact the Help Desk: <https://support.ewu.edu/support/home>