Georgia State University

Banner 9x Basic Navigation

Training Documentation
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Questions regarding information in this documentation can be e-mailed to the Banner Training Team at bantrain@gsu.edu

The training website is at http://banner.gsu.edu, from this site:

Click on Banner Help to access the Banner Help page and documentation. The documentation link is password protected.
User Name = gosolar
Password = pounce

Click on Requesting a Banner Account to access information on how to request a Banner ID

Click on Banner Training to sign up for Banner Training
Learning Objectives

At the end of this training, you will be able to:

✓ Describe Banner structure
✓ Describe the naming conventions
✓ Log in to Banner
✓ Describe the parts of the Application Navigator (AppNav)
✓ Describe the parts of a Banner pages
✓ Navigate Banner pages, sections, and fields
✓ Avoid creating duplicate records
✓ Perform query in Banner
✓ QuickFlow and My Banner Personal Menu
✓ Set Up User Preference
✓ Access electronic documentation
✓ Exit Banner
I. Banner Structure

We'll begin by explaining a little about Banner structure. Banner uses series of forms in an Oracle database to enter and retrieve information. A Banner form is similar to a paper form, except information is entered once and then it is available to be used by other users and by other forms, reports and jobs.

A. Systems, Menus and Modules

Each system consists of related forms that are grouped into lists called menus, and menus are grouped together into submenus known as modules in Bannerland. Georgia State University uses four systems: General, Student, Financial Aid, Georgia Enhancements.

General System

The forms under the General system functions allow the user to generate letters, personalize Banner functions, manage Banner system functions and run a variety of batch processes.

Student System

The Student system supports a wide range of student administration functions that are grouped into different modules such as Catalog, Registration, and Accounts Receivables.

Financial Aid System

The Financial Aid system gathers and processes financial aid information.

Georgia Enhancements System

The University System of Georgia created the Georgia Enhancements system, general known as the Georgia Modifications (GA Mods). The menus and forms in this system are related to Georgia-specific functions.

B. Types of Forms

Banner uses six types of forms to enter and access information - Application, Validation, Rule, Control, Query, and Inquiry.

Application Forms

In general you'll be using Application Forms to enter and update Banner information. The other types of forms help you find the information in the specific Banner format you need to fill in the Application Forms.

Validation Forms

Validation Forms allow you to create and update a list of values that can be entered in specific fields on Application Forms. Many fields can only use specified values found in the list of values on a Validation Form.
Rule and Control Forms

Rule and Control Forms show information that affects processing on other forms. They also provide a means for each institution to customize and set up Banner according to institution-specific policies and procedures.

Query Forms and Inquiry Forms

You'll use Query Forms and Inquiry Forms to look up information that already exists in the Banner database. These forms will often then add that information to the field you accessed them from. You can access Query or Inquiry Forms directly or from within another form.

II. Banner Form Naming Conventions

Forms are the means with which all information in Banner is entered, maintained, edited, and queried. The names of Banner forms, reports, processes, and tables are seven characters, with each character representing a position location as well as reflecting its origin and function.

Let's use the Person Identification Form - SPAIDEN - as an example. The first letter (position location 1) identifies the system that owns the form. This form is part of the Student system, so it begins with S. The second letter (position location 2), P, indicates the application module that owns the form. This form is part of the Person module. The third letter (position location 3), A, identifies the type of form as an Application form. Finally, the last four letters (position location 4 – 7) are a four-character name for the specific form. In this case, IDEN indicates that this is the Identification form.

<table>
<thead>
<tr>
<th>Position Location Assignments</th>
<th>Position Location</th>
<th>Example</th>
<th>Character Representations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifies the system owning form</td>
<td>1</td>
<td>S</td>
<td>Student System</td>
</tr>
<tr>
<td>Identifies the module owning the form</td>
<td>2</td>
<td>P</td>
<td>Person Module</td>
</tr>
<tr>
<td>Identifies the type of form</td>
<td>3</td>
<td>A</td>
<td>Application Form</td>
</tr>
<tr>
<td>Identifies a unique four character abbreviation of form description</td>
<td>4</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>E</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7</td>
<td>N</td>
<td></td>
</tr>
</tbody>
</table>

IDEN—Unique four character name representing "Identification"

For more information on Banner Naming Conventions, please refer to Appendix C as well as the Banner online documentation. In the online documentation, naming conventions is listed within the Student System under the Ellucian Banner Student section Ch 2.
**III. Logging in to Application Navigator (Appnav)**

Now that you are familiar with the basic Banner structure, let’s log in to Banner and take a closer look.

1. Open your web browser and go to [https://appnav.gosolar.gsu.edu](https://appnav.gosolar.gsu.edu).
2. The Banner log on screen will appear next. Log on with your CampusID and CampusID password and click Connect or press Enter on the keyboard.

3. The Application Navigator (Appnav) screen will appear next.
**IV. Application Navigator:**
Application Navigator (App Nav) provides access to Banner pages. Application Navigator is used to access Banner administrative applications. This function uses a Java-based web application (Admin pages) and replaces Oracle forms (INB).

Use your campus ID and campus ID password to sign in to access Application Navigator. Users can use any of the following to navigate within the Application Navigator:

- **Menu icon** (Ctrl+M) – Located in the upper left corner of the application, the **Menu icon** opens the Banner Menu. The **Menu icon** also allows users to open the My Banner menu which allows users to create a person list of regularly used page.

- **Search icon** (Ctrl+Shift+Y) – The **Search icon** is located in the upper left corner next to the Menu icon. Clicking on this icon opens the search window where users can enter either the descriptive name of a page or the Banner acronym for a page.

- **Search box** (Ctrl+ Home) in the center of the page – Users can enter either the descriptive name of the page or the Banner acronym for the page. Find the desired entry and click enter.

When on a page other than the Application Navigator page, users can return to this landing page by clicking on the **Georgia State University** return to application navigator link.
• **Online Help icon** (Ctrl+Shift+L) - Users can access Online Help using the “?” icon or the keyboard shortcut. The icon is located on the far top right corner of the page. Online help gives users additional information regarding a selected page or help in using that page. **Please Note:** This function is only available for vendor delivered pages and will not apply to Georgia Enhanced pages or custom pages.

• **Sign Out icon** – To properly log out of the system, users should use the **Sign Out** link located in the upper right corner to close the application (as opposed to just closing the browser window). Please make sure you sign out of the system and close the browser before you step away from your computer.

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**Important Note**

- *Closing the browser window does not log off your Banner session. This will create a hang session for user and may cause the lock down of student data displayed on a Banner form prior to closing the browser.*

- *Banner session is programmed to time out if it is not used in 30 minutes. If you are not planning to use Banner for an hour or more, please exit the system.*
V. Basic Navigation

Basic navigation of pages (formally forms) includes:

- Page Header
- Notification Center
- Key Block
- Sections and buttons
**Page Header**

The page header is the part of the basic navigation on all Banner pages.

The page header contains the following elements:

- **Page close icon “x”** – Always use this icon to close the page. The ‘X’ icon is usually located at the upper left-hand corner of the page.
- **Page title** – Description, acronym, version and database information.
- **Add and Retrieve icons** – These icons are used with Banner Document Management (Xtender)
- **Related Menu button** – Displays a list of pages accessible from this form.
- **Tools Menu** – Includes refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.
- **Notification center** – Will be located to the right of the Tools Menu and will display additional information as needed: successful save of data, warning message, error messages, informational messages, and number of messages to be corrected to continue in the page. 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 such as ID or course information. The key block determines what data is entered or displayed on the remainder of the page. Therefore, all information presented on the page is directly related to the key block information. The key block remains 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, populated the key block data and then click **Go**.

Users can return to the key block from the body of a page by clicking **Start Over**.
Sections

Pages are divided into sections containing additional details related to the key block information. A section can represent one record or multiple records depending on the type of information 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.
- **More Information** – Use this if supplemental data can be entered for a section. Please note: “More information” will only appear if supplemental data can be entered for the record.
**Bottom Section Navigation**

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

- **Previous Section button** – Takes users backwards in the sections of a page.
- **Next Section button** – Takes users to the next section of a page.
- **Activity Date** – System time stamp for records created or modified.
- **Activity User** – Name of account user who created or modified the record.
- **Save button** – Button used to save data.

**Notification Center Message**

Users may see four message notification types when working in Banner 9:

- **Error Notifications** – Will display an “!” in a circle when message is displayed.

  ![Error Notification Example]

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

  ![Info Notification Example]

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

  ![Success Notification Example]

- **Warning Notification** – Will display an “!” in a yield sign when message is displayed. May also display buttons, Yes/No/OK, that must be selected to continue.

  ![Warning Notification Example]
VI. Data Display Options

Required Fields

An asterisk (*) displayed next to a field name indicates that the field requires a value before continuing 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 a user leaves a section or page without entering information in a required field, the page notifies the individual in the Notification Center, requiring the user to perform some additional action.

Sort Order

In a grid layout, values can be sorted and, if you have chosen to sort 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

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

Lookup

The Lookup feature allows users to quickly find a value for a field. The Lookup button next to a field indicates that the look up feature is available.

Click the Lookup button (…), enter a filter value, and press Enter to display filtered results. Select a value and click OK, or double-click a value to return the value to the calling page.

In addition, when users are in the key blocks, and the ID field is the only visible field, pressing the tab key will allow the user to enter a name search.
**Tools Menu**

**Actions**

<table>
<thead>
<tr>
<th>Actions</th>
<th>Key Combination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh</td>
<td>F5</td>
</tr>
<tr>
<td>Export</td>
<td>Shift+F1</td>
</tr>
<tr>
<td>Print</td>
<td>Ctrl+P</td>
</tr>
<tr>
<td>Clear Record</td>
<td>Shift+F4</td>
</tr>
<tr>
<td>Clear Data</td>
<td>Shift+F5</td>
</tr>
<tr>
<td>Item Properties</td>
<td></td>
</tr>
<tr>
<td>Display ID Image</td>
<td></td>
</tr>
<tr>
<td>Exit Quickflow</td>
<td></td>
</tr>
<tr>
<td>About Banner</td>
<td></td>
</tr>
</tbody>
</table>

**Refresh**

When in the main page with sections visible, clicking refresh sends users back to the Key Block of the page.

**Export**

This is formerly the Data Extract function. Export will export page data to an Excel spreadsheet.

**Print**

Prints the current page.

**Clear Record**

Removes all information for the current record. When you save, the removed information is deleted.

**Clear Data**

Clears all information from the current record on your display. (Information is not removed from any records or tables.)
**Items Properties**
Displays the Oracle item properties window for the current field.

**Display ID Image**
Displays image associated with an ID. This option is only available when you are in the ID field. Option currently not in use at Georgia State University.

**Exit QuickFlow**
Exits users out of an active QuickFlow.

**About Banner**
Give general information about the system including installed applications, release versions, and date installed.

**Options**

<table>
<thead>
<tr>
<th>OPTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Information</td>
</tr>
<tr>
<td>Faculty Contract, College, Dept Info</td>
</tr>
<tr>
<td>Faculty Attributes and Comments</td>
</tr>
</tbody>
</table>

In Banner 9 the Options menu can be accessed via the Tools menu. Options provides a way to navigate the Banner pages and sections. Clicking on an option in the Options section of the Tools menu will take you to that page or section of a page.

Options change as the cursor location changes. Some options take you to other sections within the current page. Other options take you outside the current page to other related pages.

**Note: Using the Options Menu will cause Banner to open pages upon pages. Please use the Options Menu with caution. It is best to exit the current page and go back to the Application Navigator (Appnav) page before accessing another one.**
**Banner Document Management (Xiender)**

<table>
<thead>
<tr>
<th>BANNER DOCUMENT MANAGEMENT</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Retrieve Documents</td>
<td>Alt+R</td>
</tr>
<tr>
<td>Count Matched Documents</td>
<td></td>
</tr>
<tr>
<td>Add Documents</td>
<td>▶</td>
</tr>
</tbody>
</table>

**Retrieve Documents**

Opens Banner Document Management to display attached documents related to key block information.

**Count Matched Documents**

Gives a numerical count of the documents related to the key block information.

**Add Documents**

Allows users to add documents to the related key block information.

**Page Layout**

<table>
<thead>
<tr>
<th>PAGE LAYOUT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expanded</td>
</tr>
<tr>
<td>✓ Compact</td>
</tr>
</tbody>
</table>

Page Layout allows the user to adjust the visual layout of the page from the expanded view to the compact view. Currently, compact view is the default.
VII. Filtering Data

Users can filter data in a section if there is an active Filter icon in the section header.

Procedure:

1. Click the active Filter (F7) icon for the section.

![Filter icon](image)

**Please Note:** The notification center may provide additional instructions when available.

2. Choose the field you want to filter from the Add Another Field dropdown list.

![Add Another Field](image)

3. Choose an operator from the Contains drop-down list.
   The available operators depend on the type of field (Alphanumeric, numeric, data, check box, or other)

   The Contains operator is available for alphanumeric and other fields only. The Between operator includes the values entered. For example, for bodes “between” 1 and 5, the values 1, 2, 3, 4, and 5 are considered. Required fields do not use the Is Null and Is Not Null operators.
4. Enter a value for the selected field.

5. Optional: If you want to add another field to the filter criteria, choose a field from the Add Another Field field, select an operator and enter a value for the field that you selected. Repeat this step until all filter criteria are entered.

6. When all filter criteria are entered, click Go (F8) to display the filtered 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. Users can reverse the sort order by clicking the field label.

7. Optional: If you want to perform another filter, click Filter Again.

8. Optional: If you want to close the filter and display all unfiltered records, click the lowercase x in the upper corner of the filter window to close the filter.
VIII. Wild Card Lookup

When utilizing the Lookup option users may perform either exact match lookups or partial match lookups when some of the information is unknown. To perform a partial match lookup, users will use a “%” to replace the unknown information. For example, when searching for a student with an illegible name you may enter the known information as Phanph%ro.

1. Select the Lookup icon.

2. Choose the type of search to be completed from the options list.

3. Begin the filter process by selecting the appropriate filter. (i.e. ID, Last Name, etc.)
4. Choose the appropriate operator from the list.

5. Add any additional filters by clicking **Add Another Field** if any additional information is known. Select **Go** button.

6. You will be provided a list of compatible information and may either highlight the information and use the Select button from the lower right of the form or select Cancel.

7. The selected information will be returned to the calling page.
IX. Multiple Records

Data can exist in multiple records of the same type in the database, for example addresses, are displayed in multiple ways.

Records can be viewed in two different ways:

- **One record at a time.** In this instance, the details of the data are not displayed in a table grid, but rather in a more easily readable manner. You can move from record to record using pagination controls located at the bottom left of the page.

- **In a grid.** In this instance, the data is present in column and row format. You may need to scroll to view all the data. You can page through the records using the pagination controls (first, last, next, previous, or specific page number), decide how many records you want to review in the grid, and sort the data in ascending or descending order.
Help

Application Navigator provides online help for delivered pages.

Click on the question mark (?) in the Application Navigator header to open the help for pages in context. You can perform various actions in the help suite. For Example, you can search for topics and print the information.
X. Advanced Features

Data Export

Users can export data from a transformed Banner page to an Excel spreadsheet (.xlsx) by clicking **Tools**, then **Export**.

Item Properties

**Item Properties** list all properties for the field where the cursor is currently located.

**Item Properties** include the field’s internal database name, whether it is required, type of data (character or numeric), maximum length, and other characteristics of the field. To display Item Properties for a field, place the cursor in the field and select **Tools** then **Item Properties**.
XI. Quickflows

Using Quickflow

1. From the Application Navigation (appnav) page, type in Quickflow (GUAQFLW) in the search box.

2. Type the QuickFlow code in the Quickflow field or search for a Quickflow name by clicking the (…) button.
3. Select Start to begin the Quick flow.
4. Enter and save data on the page.
5. Exit the page. The next page in the QuickFlow will appear
6. Repeat steps 4 and 5 for each page in the QuickFlow. After you pass through all the pages in the QuickFlow, the GUAQFLW form reappears.
Searching for a Quickflow Name

1. Click the (…) button in the QuickFlow Form

2. Once on the QuickFlow Query page, find the appropriate QuickFlow code. Use the arrows to scroll through the pages. The QuickFlow codes are in alphabetical order. The bottom section of the page shows the Form Name that are a part of that QuickFlow.
3. Select the appropriate QuickFlow code by double clicking the code. This will populate the correct QuickFlow into the QuickFlow form.
4. Select Start to begin the QuickFlow.

Exiting the QuickFlow

To exit the QuickFlow before all pages are accessed, select Tools and then select Exit Quickflow.
XII. My Banner Personal Menu

Users can create a personal menu tied directly to their Banner ID. Personal menus contain pages, jobs, menus, and Quickflows designated to the list for each individual user. Once the personal menu is created, users may access it from the Menu on any Banner page.

To setup the My Banner personal menu:

1. From the Application Navigator page, use either the search box in the middle of the screen or the search icon to enter either “My Banner” or “GUAPMNU”.

2. The My Banner maintenance page contains:
   - Type: A drop down menu located at the top of the screen allowing users to choose Oracle Forms, Job Submissions, Menus, Menu Messages, and Workflows to access all forms needed to customize My Banner.
   - Object Type: All available pages, jobs, menus, or Quickflows associated with the chosen type selected from the dropdown menu.
   - Buttons: Buttons are used to insert or remove selections from the available list to the My Banner list.
   - Object Section: Will display the contents of the personal menu.
3. To add objects to the My Banner personal menu, select the name from the left pane by double clicking it and then use the insert buttons in the center of the screen to add to the Object Selection on the right pane.

4. After each page selection to the right pane, select Save in the bottom right hand corner to retain selection.
XIII. Avoid creating duplicate records in Banner

When you are entering new person or non-person information in BANNER, it is critically important that you perform a thorough query/search of the database BEFORE entering the information. This is to make sure that the person or non-person does not already have a record in the system.

Serious problems arise when duplicates are created. For example, student records can be exist on multiple IDs. This will create trouble for Student Accounts, Financial Aid, and Registrar because registration and course history could be fragmented among the duplicates – no one ID would have the complete student record. This makes the correct billing and granting of Financial Aid impossible. It is very difficult to detect duplicate records until they cause a problem, and we want to preserve as much data integrity on the front end as we can.

The rule of thumb to follow is that you should always assume that the person or non-person you need to enter already has a record in BANNER. Your job is to find that record using all available search methods; only after a thorough query has been conducted should you enter the new record.

Note: Please follow the steps provided in the Thorough Person Search training documentation to perform a thorough search before creating IDs in Banner.

Note: When entering a new record, please refer to the GSU Data Entry Standard and

Using wildcard symbols to search

The % is the key to a successful name search. % is a wildcard - use it freely. Whenever there is any possible question in the spelling or structure of a name, use the %.

For example, the name O'Brien may have been entered in a variety of ways. Use the % in any questionable situation. This name should be searched by O%rien. Keep this in mind for all Mc_, Mac, O', and Di_ and other names of this type.

International names present a unique challenge. Use the % freely! Try all permutations of all the names provided. Sometimes it is not clear which name(s) should be first and/or last.

If you’ve entered what you think is the correct name, ID number, or SSN, but the system fails to find the person you need, do not assume that the person does not have a record in the system.

Banner is very picky about the way you query for information in the database, and a query feature called wildcarding will help you find the record you need. You can use these wildcard symbols when querying in both the key block and in query forms. The two wildcard symbols are % (percent) and _ (underscore). Both stand for any character; the difference is that % stands for any amount of characters, whereas _ can only stand for one character. You can use wildcards in a number of ways. For example:
• All entries that begin with Ab = Ab%
• All entries that contain ab = %ab%
• All entries that have ab as the final two characters = %ab
• All entries that have b as the second character = _b%
XIV. Changing Your Password

1. Go to the CampusID website at: https://campusid.gsu.edu/index.cfm
2. Click the Change your CampusID password link
3. Follow the instructions to reset your password.

Please Note: Resetting your CampusID password will affect logging into systems other than INB.
Accessing Electronic Documentation

At Georgia State, you can get additional Banner information (in the form of Adobe Acrobat® PDF files that can be searched) by clicking on the Banner Bookshelf link from the Main Menu or by going to the Banner documentation online. Go to http://banner.gsu.edu and click on the documentation link. The link is password protected. The password is pounce. Click on Ellucian Banner documentation. An Acrobat Reader® window appears that lists each Banner module. Click the name of the module to see the table of contents, then click on the topic you want to see.
Best Practices and Tips When Using Banner

- To avoid locking up data, it is best to exit the current page and always go back to the Application Navigator (AppNav) page before accessing another page. Remember one page at a time!

- Using the Options Menu will cause Banner to open pages upon pages. Please use the Options Menu with caution. It is best to exit the current page and go back to the Application Navigator (AppNav) page before accessing another one.

- Closing the browser window does not log off your Banner session. This will create a hang session for user and may cause the lock down of student data displayed on a Banner form prior to closing the browser. **Please use the Sign Out button to exit Banner.** See page 40 for detail information on how to exit Banner.

- Banner session is programmed to time out if it is not used in thirty minutes. If you are not planning to use Banner for thirty minutes or more, please exit the Banner system.

- When your Personal Menu is all set, you can access it by clicking on My Banner. See page 38 for Personal Menu set up information.

- The Auto Hint line is your friend as it displays information about the current form and the actions you are performing. If Banner does not seem to be functioning as you expected, refer to this line for help. It is likely that an error message is being displayed.

- If you are stuck in an enterable field because you do not want to enter any data in the field and Banner keeps prompting you that “Field must be entered or deleted first”, click on Tools and select Clear Data to get out of the blank enterable field.

- Tip for entering today’s date in a date field – type the letter ‘t’ in the field and tab out of the field will populate today’s date in the field.

- On the SGASTDN form under the Academic and Graduation Status, Dual Degree block, DO NOT update Graduation Status Fields. These fields are for National Student Clearinghouse purposes and should not be manually updated.

- A few notes about querying
  - Capitalization matters. Data is matched against the search criteria exactly as you enter them.
  - To clear a query and enter a new one, select **Enter Query icon** from the Tool Bar.
Banner Keyboard Shortcuts:

The following table lists the keyboard shortcuts that can be used to navigate through Banner 9. **Bold entries** indicate actions with keyboard combinations that are new or updated in Banner 9.

<table>
<thead>
<tr>
<th>Action</th>
<th>Banner 8</th>
<th>Banner 9</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Application Navigator</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access Help</td>
<td>Banner 9 keyboard</td>
<td>CTRL+M</td>
</tr>
<tr>
<td>shortcuts will work in Banner 8 if you are</td>
<td></td>
<td></td>
</tr>
<tr>
<td>running Banner 8 with Application Navigator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>and have applied the keyboard shortcut</td>
<td></td>
<td></td>
</tr>
<tr>
<td>configuration settings.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access Menu</td>
<td>CTRL+Y</td>
<td></td>
</tr>
<tr>
<td>Display recently opened items</td>
<td>CTRL+SHIFT+L</td>
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</tr>
<tr>
<td>Search</td>
<td>CTRL+SHIFT+Y</td>
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</tr>
<tr>
<td>Sign out</td>
<td>CTRL+SHIFT+F</td>
<td></td>
</tr>
<tr>
<td><strong>Banner Document Management (BDM)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add BDM Documents</td>
<td>Icon or Menu</td>
<td>ALT+A</td>
</tr>
<tr>
<td>Retrieve BDM Documents</td>
<td>Icon or Menu</td>
<td>ALT+R</td>
</tr>
<tr>
<td>Cancel Page, Close Current Page, or</td>
<td>CTRL+Q</td>
<td>CTRL+Q</td>
</tr>
<tr>
<td>Cancel Search/Query (in Query mode)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Choose/Submit</td>
<td>ENTER</td>
<td>ENTER</td>
</tr>
<tr>
<td>Clear All in Section</td>
<td>SHIFT+F5</td>
<td>SHIFT+F5</td>
</tr>
<tr>
<td>Clear One Record</td>
<td>SHIFT+F4</td>
<td>SHIFT+F4</td>
</tr>
<tr>
<td><strong>Clear Page or Start Over</strong></td>
<td>SHIFT+F7</td>
<td>F5</td>
</tr>
<tr>
<td>Count Query</td>
<td>SHIFT+F2</td>
<td>SHIFT+F2</td>
</tr>
<tr>
<td>Delete Record</td>
<td>SHIFT+F6</td>
<td>SHIFT+F6</td>
</tr>
<tr>
<td>Down/Next Record</td>
<td>Down Arrow</td>
<td>Down Arrow</td>
</tr>
<tr>
<td>Duplicate Item</td>
<td>F3</td>
<td>F3</td>
</tr>
<tr>
<td>Duplicate Selected Record</td>
<td>F4</td>
<td>F4</td>
</tr>
<tr>
<td>Edit</td>
<td>CTRL+E</td>
<td>CTRL+E</td>
</tr>
<tr>
<td>Execute Filter Query</td>
<td>F8</td>
<td>F8</td>
</tr>
<tr>
<td>Exit</td>
<td>CTRL+Q</td>
<td>CTRL+Q</td>
</tr>
<tr>
<td>Expand/Collapse Drop-down Field</td>
<td>Click field</td>
<td>ALT+Down Arrow</td>
</tr>
<tr>
<td>Export</td>
<td>Extract Data with Key</td>
<td>SHIFT+F1</td>
</tr>
<tr>
<td>or Extract Data no Key</td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Page</td>
<td>Not applicable</td>
<td>CTRL+Home</td>
</tr>
<tr>
<td>Action</td>
<td>Banner 8</td>
<td>Banner 9</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>----------</td>
<td>----------</td>
</tr>
<tr>
<td>Insert/Create Record</td>
<td>F6</td>
<td>F6</td>
</tr>
<tr>
<td>Last Page</td>
<td>Not applicable</td>
<td>CTRL+End</td>
</tr>
<tr>
<td>List of Values</td>
<td>F9</td>
<td>F9</td>
</tr>
<tr>
<td>More Information</td>
<td>ALT+H</td>
<td>CTRL+SHIFT+U</td>
</tr>
<tr>
<td>Next Field or Item</td>
<td>Tab</td>
<td>Tab</td>
</tr>
<tr>
<td>Next Page Down</td>
<td>Page Down</td>
<td>Page Down</td>
</tr>
<tr>
<td>Next Section</td>
<td>CTRL+Page Down</td>
<td>ALT+Page Down</td>
</tr>
<tr>
<td>Open Menu Directly</td>
<td>F5</td>
<td>CTRL+M</td>
</tr>
<tr>
<td>Open Related Menu</td>
<td>Not applicable</td>
<td>ALT+SHIFT+R</td>
</tr>
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<td>Open Tools Menu</td>
<td>Not applicable</td>
<td>ALT+SHIFT+T</td>
</tr>
<tr>
<td>Page Tab 1</td>
<td>Not applicable</td>
<td>CTRL+SHIFT+1</td>
</tr>
<tr>
<td>Page Tab 2</td>
<td>Not applicable</td>
<td>CTRL+SHIFT+2</td>
</tr>
<tr>
<td>and so on</td>
<td></td>
<td>and so on</td>
</tr>
<tr>
<td>Previous Field or Item</td>
<td>SHIFT Tab</td>
<td>SHIFT Tab</td>
</tr>
<tr>
<td>Previous Page Up</td>
<td>Page Up</td>
<td>Page Up</td>
</tr>
<tr>
<td>Previous Section</td>
<td>CTRL+Page Up</td>
<td>ALT+Page Up</td>
</tr>
<tr>
<td>Print</td>
<td>SHIFT+F8</td>
<td>CTRL+P</td>
</tr>
<tr>
<td>Refresh or Rollback</td>
<td>SHIFT+F7</td>
<td>F5</td>
</tr>
<tr>
<td>Save</td>
<td>F10</td>
<td>F10</td>
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<tr>
<td>Search or Open Filter Query</td>
<td>F7</td>
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<tr>
<td>Select on a Called Page</td>
<td>CHIFT+F3</td>
<td>ALT+S</td>
</tr>
<tr>
<td>Toggle Multi/Single Records View</td>
<td>Not applicable</td>
<td>CTRL+G</td>
</tr>
<tr>
<td>Up/Previous record</td>
<td>Up Arrow</td>
<td>Up Arrow</td>
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<tr>
<td><strong>Workflow</strong></td>
<td></td>
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</tr>
<tr>
<td>Release Workflow</td>
<td>Icon or Menu</td>
<td>ALT+Q</td>
</tr>
<tr>
<td>Submit Workflow</td>
<td>Icon or Menu</td>
<td>ALT+W</td>
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