

# University of Vermont

## Banner 9 User Guide

### Table of Contents




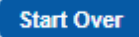

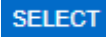


















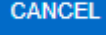


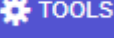

Changes in Banner 9.....	1
New Terminology and Shortcut Keys.....	1
New Features.....	2
Banner 9 Landing Page.....	3
Screen Layout.....	7
Basic Navigation Sidebar.....	7
Page Header.....	7
Info/Warning/Caution/Error.....	8
Key Block.....	8
Section(s) (“Block” in B8).....	9
Section Header, Left Side.....	9
Section Header, Right Side.....	9
Section Pagination.....	10
Section Navigation.....	10
Blank Screen.....	11
Queries.....	12
Additional Resources.....	17



## Changes in Banner 9

### New Terminology and Shortcut Keys

Some are the same, some are new....

<b>Banner 8 vs. Banner 9 Navigation</b>				
ACTION	ICON (B8)	SHORTCUT (B8)	ICON (B9)	SHORTCUT (B9)
Save		F10		F10
Rollback		Shift+F7		F5
Select		Shift+F3		
Insert Record		F6		F6
Remove Record		Shift+F6		Shift+F6
Copy Record	No Icon	F4		F4
Previous Record		Up Arrow		Up Arrow
Next Record		Down Arrow		Down Arrow
Previous Section Previous Block		Ctrl+PgUp		Alt+PgUp
Next Section Next Block		Ctrl+PgDn		Alt+PgDn
Enter Query		F7		F7
Execute Query		F8		F8
Cancel Query		Ctrl+Q		Ctrl+Q
View/Send Message			No Icon	
Print		Shift+F8		Ctrl+P
Quick Search	No Icon	F5		Ctrl+Shift+Y

## New Features

### 1. Resizing.

You can resize the Banner window! Click and drag any of the sides or corners, just like any other window, and the display will adjust accordingly. You can stretch the screen to allow more data, or shrink it to take up less space. You can also use Ctrl+= (control with =) to increase the zoom, and Ctrl+- (control with dash) to decrease the zoom. Ctrl+0 (zero) resets the zoom to 100%.

### 2. Ordering/Rearranging columns.

On any page that displays columns of data, you can re-arrange the (most) columns to suit your preference. Click on the column header, move it where you want it, and release the mouse button. The data will be re-arranged per your direction. This will last as long as you are working in that page. If you go to another page and come back, the columns will revert to the default arrangement.

### 3. Sorting.

On any page that displays columns of data, you can sort by any column. Click on the column header and the page will sort by the values in that column. You can sort by Ascending or Descending order by clicking on the small triangle in that column header.

### 4. Carrying Student ID between pages (forms).

If the page you are going to uses the same Key information (e.g., Student ID), the student ID will go with you. If the new page uses a different Key (e.g., CRN), the student ID will not go with you.

### 5. Details.

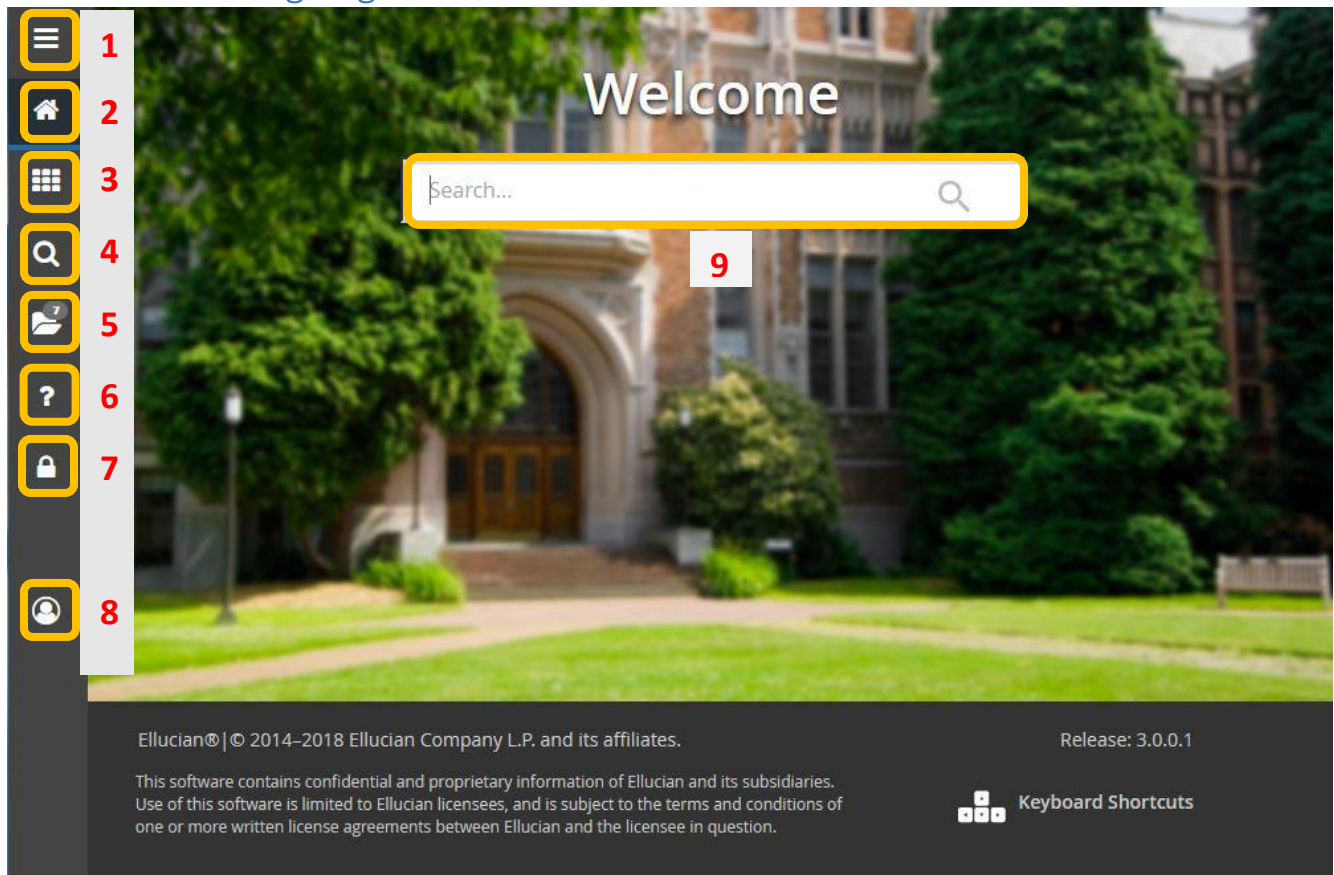
When you have a screen with a list of items, such as SHACRSE you do not have to select the correct record then click on the Details icon. If you click on the magnifying glass icon, you will get the details for that record:

COURSE SUMMARY													Insert	Delete	Copy	Filter
Select	Term	Part of Term	Campus	Level	CRN	Subject	Course	Section	Hours	Grade	Grading Mode	Repeat	Course Title			
	201709	1	M	UG	95607	ANTH	089	A	3.000	A	N		D2:SU:Global Health Devt & Div			
	201709	1	M	UG	95206	EDHE	046	A	3.000	A+	N		Personal Health			
	201709	1	M	UG	95432	ENVS	181	A	3.000	A+	N		D1:Environmental Justice			
	201709	1	M	UG	94551	HCOL	185	O	3.000	A+	N		Issues in Food Sys-Food Safety			
	201709	1	M	UG	91626	HLTH	155	OL1	3.000	A+	N		D1:Racism & Health Disparities			
	201709	1	M	UG	93546	STAT	141	C	3.000	A-	N		QR: Basic Statistical Methods			

### 6. Difference in screen flow.

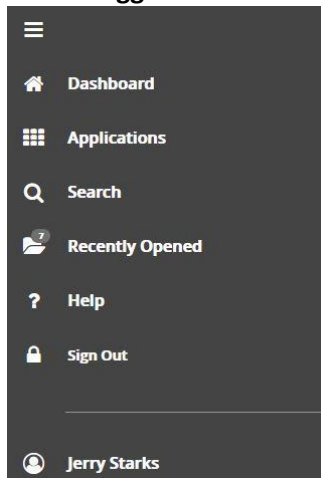
Situation: You are looking at a student record on one page (e.g., SGASTDQ), then navigate to a different page (e.g., SFAREGS) and make a change on the same student record. If you return directly to the first page (SGASTDQ), you will return to the *exact display you were previously in*. This means whatever you changed in the second page (SFAREGS) will not appear to have changed. When you return to the first page (SGASTDQ) you must click on [Start Over] or press F5 in order to refresh the screen and see the updates you made elsewhere.

## Banner 9 Landing Page



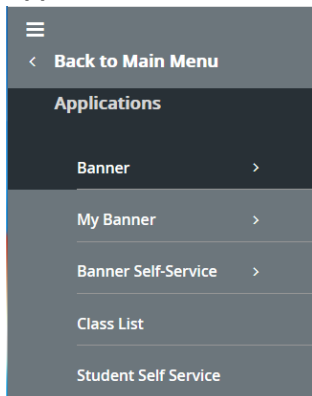
The Navigation Toolbar (items 1-7 above) is on every screen.

1. **Menu Toggle:** Click on this icon to expand the Banner Menu (column on the left):



2. **Dashboard:** Click on this icon to return to the Landing Page.

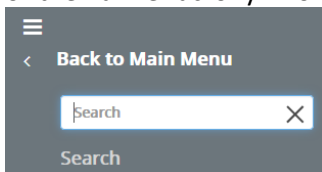
3. **Applications:** Click on this icon to access Banner (all pages) and My Banner. Banner Self-Service, Class List, and Student Self-Service will display when they are ready at a future date.



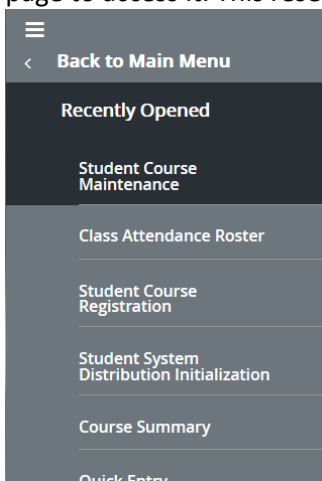
“**Banner >**” lists all pages in Banner 9. It shows the descriptive names and the Banner acronyms. This menu works by groups. To get to SGASTDQ you go BANNER > Student > General Student > General Student Summary. To get to a specific page more quickly, either use the Search Icon, enter the acronym and hit [Enter], or specify the page in your My Banner (see below).

“**My Banner >**” lists the pages you frequently visit, or pages that you specify in GUAPMNU.

4. **Search:** Click on this icon to open the search window. You can enter the descriptive name of the page or the Banner acronym for the page.



5. **Recently Opened:** This displays with a count of the pages you have visited. Open the list and select a page to access it. This resets to 0 every time you log in to Banner 9.



6. **Help:** Online Help Button. Once on a page, click this to go to a help page for that specific page.

### Banner 9 Keyboard Shortcuts

#### Banner Landing Page

Display Applications	Ctrl+M
Display Recently Opened	Ctrl+Y
Display Dashboard	Ctrl+Shift+X
Help	Ctrl+Shift+L
Search	Ctrl+Shift+Y
Sign Out	Ctrl+Shift+F

**Banner Document Management (BDM)**

Add BDM Documents	Alt+A
Retrieve BDM Documents	Alt+R

**General Page Commands**

Cancel/Close Page; Cancel Search/Query	Ctrl+Q
Change MEP Content	Alt+Shift+C
Choose/Submit	Enter
Clear All in Section	Shift+F5
Clear One Record	Shift+F4
Clear Page/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 or Item	Tab
Next Page Down	PgDn
Next Section	Alt+PgDn
Open Applications Menu Directly	Ctrl+M
Open Related Menu	Alt+Shift+R
Open Tools Menu	Alt+Shift+T
Page Tab 1, Page Tab 2, etc.	Ctrl+Shift+1, Ctrl+Shift+2, etc.
Previous Field or Item	Shift+Tab
Previous Page Up	PgUp
Previous Section	Alt+PgUp
Print	Ctrl+P
Refresh or Rollback	F5
Save	F10
Search/Open Filter Query	F7
Select on a Called Page	Alt+S
Toggle Multi/Single Record View	Ctrl+G
Up/Previous Record	Up Arrow

**Workflow**

Release Workflow	Alt+Q
Submit Workflow	Alt+W

7. **Sign Out:** When you are finished, click on this to make sure you have logged out of the application.
8. **User:** This shows who is logged in.
9. **Search Box:** Enter the descriptive name or the Banner acronym of the page you want. A drop-down will display available options. Click on an option to go to that page, or complete typing and tap [Enter].

## Screen Layout

The screenshot displays the Banner 9 Student Course Maintenance interface. The top header bar (B) shows the page title 'Student Course Maintenance SHATCKN 9.3.11 (BDEV)' and a 'Start Over' button. The navigation sidebar (A) contains icons for Menu, Dashboard, Applications, Search, Recently Opened, Help, and User Name. The main content area (C, D) features tabs for 'Cooperative Education' and 'Components'. The 'Cooperative Education' tab is active, showing a table with columns: CRN, Subject, Subject Description, Course, Course Title, Section, and Campus. The table contains one record: CRN 91387, Subject HLTH, Subject Description Health, Course 010, Course Title Health & Wellness, Section B, and Campus M. Below this is a 'GRADES' section with a table containing one record: Sequence Number 1, Grade SP, Grade Mode X, Grade Mode Description Normal A-F grades and SP/UP, Credit Hours 1.000, Attempted Hours 1.000, and Change Reason OE. The 'LEVEL' section shows a table with one record: Code UG, Code Description Undergraduate, and Primary Level Indicator checked. A 'SAVE' button is located at the bottom right (E).

### A Basic Navigation Sidebar

This is the Navigation Toolbar, which appears at the left side of every page in Banner 9. It includes Menu Toggle, Dashboard, Applications, Search, Recently Opened, Help, and User Name.

### B Page Header

This is also at the top of most pages in Banner 9.

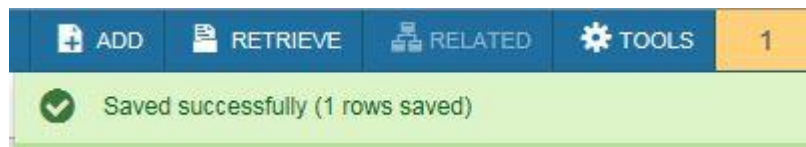


1. [X] – This is the Close Page Icon. It is good practice to always click on the X to close a page.
2. Page Title – Displays the page title and acronym.
3. [RELEASE] and [SUBMIT] – These buttons will only appear with Quickflows.
4. [ADD] and [RETRIEVE] – These buttons are used with Banner Document Management.
5. [RELATED] – Click here to display a list of related pages that may be accessed from this page. This replaces the Option button in Banner 8.
6. [TOOLS] – The Tools Menu includes Search;  
 ACTIONS: Refresh, Export, Print, Clear Record, Item Properties, Display ID Image, Exit Quickflow, About Banner;  
 OPTIONS: tabs that can be accessed on this page;  
 BANNER DOCUMENT MANAGEMENT: Retrieve Documents, Count Matched Documents, Add Documents;  
 PAGE LAYOUT: Expanded, Compact.

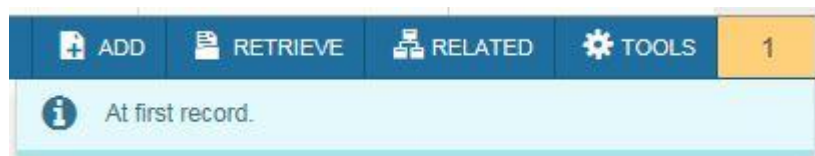


## Info/Warning/Caution/Error

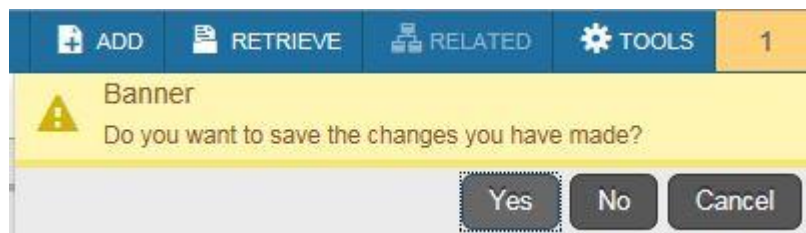
These messages display just below the Page Header, at the upper right of the screen:



Successful completion of an action.



Information: In this example, if you try to go up to a previous record this information message displays.



Caution: Status of the action is incomplete or unsure: there may be option buttons.



Error: Cannot do what was asked.

All messages will display until they are dismissed. All can be dismissed by clicking on the number at the upper right of the screen. Clicking on the number will also provide more details, if any are available.

## C Key Block

Key block by itself:



The Key block is where you tell Banner what specific record you want to see. When you are in the Key block you can enter data in all the fields that are enabled. Clicking on the [...] for any field will open a dropdown that lists the valid entries for the *field your cursor is in*. To display the data you requested, click on [Go] or Alt-PgDn.

Key block after Go is pressed:



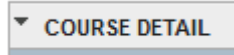
When you are not in the Key block the fields are all condensed and disabled. They display the criteria for the selected record. To return to the Key block, click [Start Over] or press F5.

## D Section(s) (“Block” in B8)

Sections display the details requested by the Key block. A Section may represent one record or multiple records depending on the type of information you are working with. If multiple Sections are displayed, use Alt-PgDn/Alt-PgUp or the arrow keys at the bottom of the screen (see Section Navigation below) to move between Sections.

COURSE DETAIL							
Cooperative Education		Components					
CRN	Subject	Subject Description	Course	Course Title	Section	Campus	Camp
91387	HLTH	Health	010	Health & Wellness	B	M	Main
Record 1 of 1 <span style="float: right;">10 Per Page</span>							
GRADES							
Sequence Number	Grade	Grade Mode	Grade Mode Description	Credit Hours	Attempted Hours	Change Reason	Ch
1	SP	X	Normal A-F grades and SP/UP	1.000	1.000	OE	Or
Record 1 of 1 <span style="float: right;">10 Per Page</span>							
LEVEL							
Code *	Code Description					Primary Level Indicator *	
UG	Undergraduate					<input checked="" type="checkbox"/>	
Record 1 of 1 <span style="float: right;">10 Per Page</span>							
							SAVE

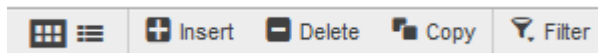
### Section Header, Left Side



At the left of each Section Header are two items:

1. Carat Icon – Click this to open or close the section.
2. Description of the information contained in the section.

### Section Header, Right Side



At the right of each Section Header are six items:

1. Multiple Records – for document handling.
2. Single Record – for document handling.
3. [Insert] – Click this to insert a blank record into the Section.
4. [Delete] – Click this to delete a record from the Section.
5. [Copy] – Click this to copy the record where your cursor is in the Section.
6. [Filter] – Click this to filter (search) for records in the Section.

## Section Pagination

If a Section can contain more than one record, a pagination panel appears at the bottom of that Section:

Select	Term	Part of Term	Campus	Level	CRN	Subject	Course	Section	Hours	Grade	Grading Mode	Repeat
	201709	1	M	UG	90127	EC	012	A	3.000	C+	N	
	201709	1	M	UG	95046	POLS	041	D	3.000	A-	N	
	201709	1	M	UG	95053	POLS	071	C	3.000	B	N	
	201709	1	M	UG	95144	POLS	125	A	3.000	A	N	
	201709	1	M	UG	93541	STAT	111	A	3.000	B	N	
	201701	1	M	UG	15608	AS	096	E	1.000	A+	N	
	201701	1	M	UG	11598	ENGS	001	CC	3.000	A-	N	
	201701	1	M	UG	11196	GEOL	007	A	3.000	A-	N	
	201701	1	M	UG	10371	HST	011	A	3.000	A	N	I
	201701	1	C	UG	11966	MU	010	ZRA	3.000	A	N	

Record 1 of 12

Click the right/left single arrow to go to the next/previous page. Click the right/left arrow with a vertical line to go to the last/first page.

Click the dropdown arrow to specify how many records will display on each page. Remember, in Banner 9 you can change the size of your Banner window.

Furthermore, in many Sections the total information provided is more than will fit on the screen even when the window is full-width, so scroll bars are provided at the bottom of the Section. Keep this in mind when you are looking for a particular field.

Sequence Number	Grade	Grade Mode	Grade Mode Description	Credit Hours	Attempted Hours	Change Reason
1	SP	X	Normal A-F grades and SP/UP	1.000	1.000	OE

Record 1 of 1

## E Section Navigation

At the bottom of most pages are the following buttons:

		Activity Date 09/18/2018 10:15:55 AM	Activity User JSTARKS	SAVE
EDIT Record: 1/1 SGBSTDN_SGBSTDN_TERM_CODE_EFF [1]				

The up and down arrows correspond to Alt-PgUp and Alt-PgDn. Click on the down arrow to go to the next Section (Block). Click on the up arrow to go to the previous Section (Block).

Just like in Banner 8, when you are in a Key block click the down arrow (Alt-PgDn) to get you into the Sections. However, when you are in a Section, clicking the up arrow (Alt-PgUp) will not return you to the Key block. You have to click on [Start Over] (Rollback) to get back into the Key block.

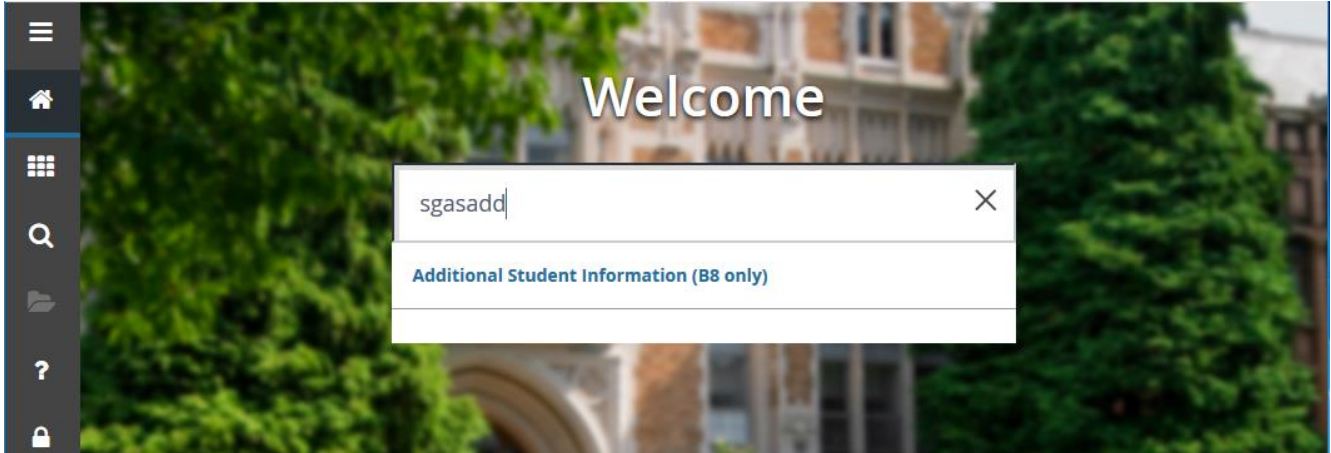
The Activity Date/Time and the Activity User displays in this area.

Click the [SAVE] button (far right) to save a record. This button corresponds to F10.

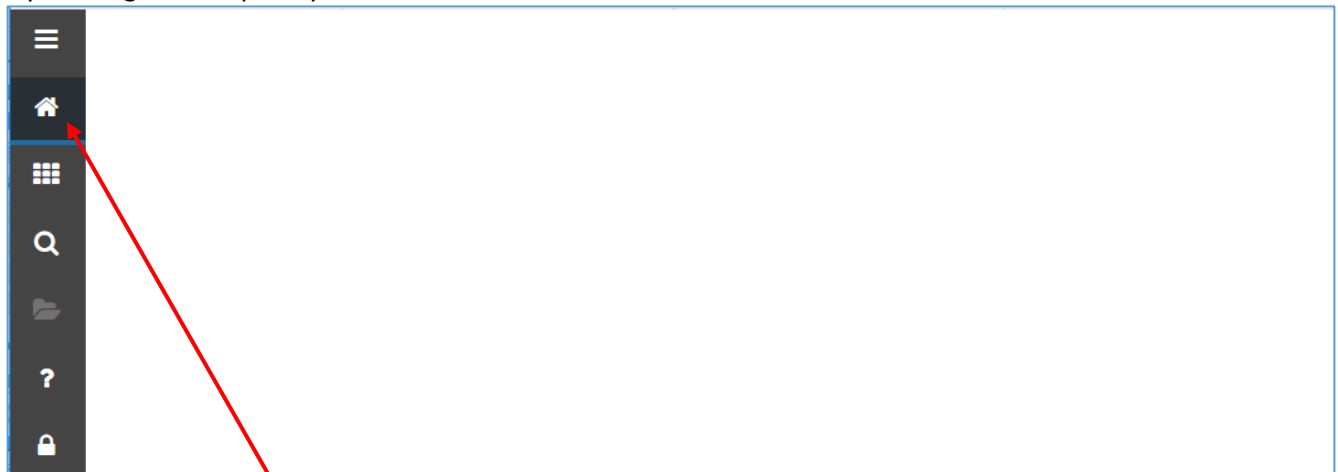
Note the name of the data element displays at the bottom of the screen. This is the data element where your cursor is.

## Blank Screen

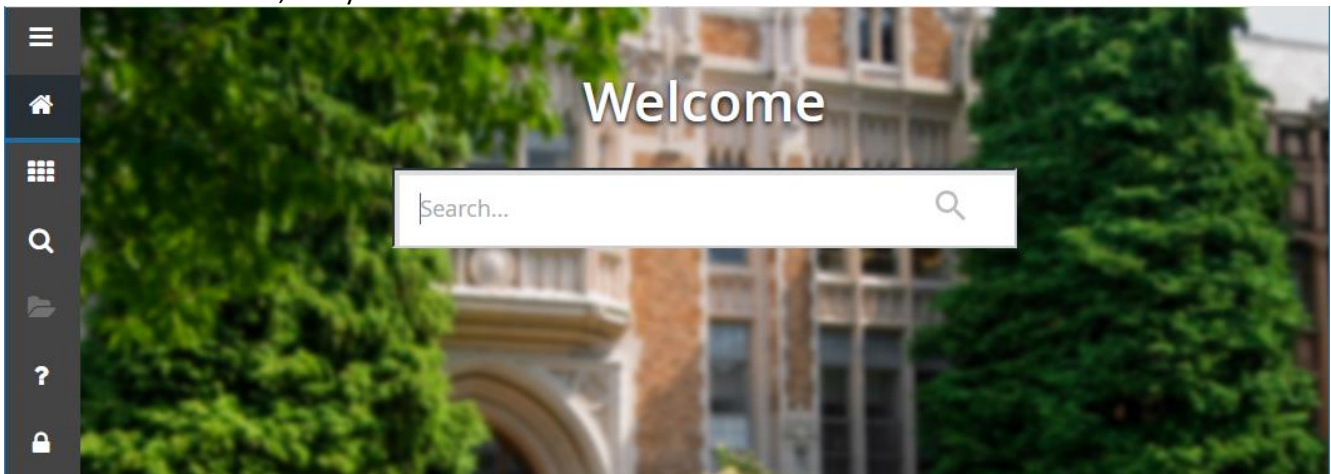
If you try to go to a page that has not yet been transformed from Banner 8...



...you will get a completely blank screen:



Click on the Home icon, and you will be returned to the Welcome Screen.



## Queries

F7 (Query) and F8 (Execute Query) still work the same way as in Banner 8. The buttons are in different places.

The Query button is usually at the end of a field and looks like this:



The Execute Query button is usually at the lower right of the section, is labeled [Go], and looks like this:



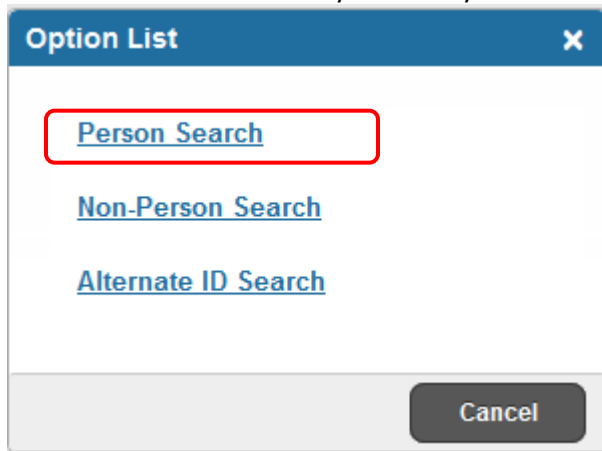
For example, to search for a name.

1. Go to a page that requires a name or an ID (example: SGASTDN). Click on the Query button:



Get Started: Fill out the fields above and press Go.

2. Depending on which screen you are coming from, a slightly different Option List will display. The full list is shown below; from some screens (like SGASTDN), only Person Search and Alternate ID Search are shown. Some screens send you directly to the Search Screen Basic Filter.



For this example I clicked on Person Search.

3. This is the Person Search Basic Filter screen:

Person Search SOAIDEN 9.3.11 (BDEV)

PERSON SEARCH

Basic Filter Advanced Filter

ID Last Name First Name Middle Name

Change Indicator Add Another Field ...

Clear All Go

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix
----	-----------	------------	-------------	------------	------------------	--------

Case Insensitive Query  Case Sensitive Query

Enter the information you have; tab twice to move to the next field.  
NOTE: Wildcards (% and \_ ) will work in these fields.

4. This query says “Search for any record with a Last Name containing ‘brown’ (with anything before it and anything after it) and with a First Name that starts with ‘j’ ”.

Person Search SOAIDEN 9.3.11 (BDEV)

PERSON SEARCH

Basic Filter Advanced Filter

ID Last Name First Name Middle Name

Change Indicator Add Another Field ...

Clear All Go

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix
----	-----------	------------	-------------	------------	------------------	--------

Case Insensitive Query  Case Sensitive Query

Press F8 or click [Go] to execute the search.

Note: the default is Case Insensitive Query. You can select Case Sensitive Query if you wish.

5. This is the resulting list of names: (names were blanked out for student privacy)

The screenshot shows the Banner 9 Person Search interface. The header includes the University of Vermont (BANDEV) logo, user name Jerry Starks, and a Sign Out button. The main area displays a table of search results with columns: ID, Last Name, First Name, Middle Name, Birth Date, Change Indicator, Prefix, Suffix, and Name Type. The table contains 20 rows of data. Annotations are placed on the interface: 'a.' is on the Filter Again button; 'b.' is on the record count '1 of 47'; 'c.' is on the 'Per Page' dropdown; 'd.' is on the First Name column; and 'e.' is on the SELECT button. The bottom of the screen shows a 'QUERY' section with 'Record: 1/932' and 'SPRIDEN SPRIDEN\_ID [1]'.

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
95	B	J		11/30/87				
95	B	J		12/16/95				
95	B	J		04/11/57				
95	B	J		05/14/99				
95	B	J		02/03/90				
95	B	J		06/04/81				
95	B	J		11/30/99				
95	B	J		08/15/91				
95	B	J	d.	11/22/85				
95	B	J		08/26/99	Name Change			
95	B	J		08/26/99				
95	B	J		03/27/96				
95	B	J		03/02/98				
95	B	J		02/12/79				
95	B	J		08/01/91				
95	B	J						
95	B	J						
95	B	J						
95	B	J		09/09/96				
95	B	J		08/20/96				

- Add additional filters/qualifiers by clicking [Filter Again]. This will return you to the previous screen and allow you to add additional qualifiers or to specify more closely.
- This is the count of records found by the Query, and the position of the current selection.
- You can select 10, 20, 30, 40, or 50 records to display on the page. Again, with Banner 9 you can resize your Banner window.
- Click in any column to select a record.
- Once you have selected the record you want, click [SELECT] to bring that record back into the previous page (in this example, SGASTDN).

6. If you want to narrow down a search or if you have odd input data, you can click on Advanced Filter.

The screenshot shows the Banner 9 Person Search interface with the Advanced Filter options highlighted. The 'Advanced Filter' button is circled in red. Below it, there are input fields for ID, Last Name, First Name, and Middle Name. There is also a dropdown menu for Change Indicator and an 'Add Another Field ...' button. At the bottom, there are 'Clear All' and 'Go' buttons. The table below the filter section shows columns: ID, Last Name, First Name, Middle Name, Birth Date, Change Indicator, and Prefix. The 'Case Sensitive Query' radio button is selected.

## 7. This is the Advanced Filter page.

The primary difference is the middle field, which is the qualifier. The default is 'Equals', but you can select from this list for any qualifier:

- a. Contains = %xxx%.  
This will include anything that has the specified letters with anything in front of them and anything after them. This is very useful for searching for hyphenated last names.
- b. Like = works a lot like 'Equals'.
- c. Starts With = xxx%.  
This will include anything that starts with the specified letters. This is useful for searching for names that may contain a suffix, like Jr. or III.
- d. Ends With = %xxx%.  
This will include anything that ends with the specified letters, no matter what is in front of them.
- e. Equals = xxx  
This will only include records that have the specified letters and only those letters. This type of search will miss many names.
- f. Not Equal = 'anything except xxx'  
Be VERY CAREFUL in using this qualifier, or you will get the entire database minus 30 or 40 names. Always use this in conjunction with another field that is very tightly qualified.



8. Press F8 or click on [Go] to execute the search. The results will display as shown in #5 above.
9. If you want to tightly specify a search, you can use wildcards.
  - % means 'any number of characters'
  - \_ (underscore) means 'any 1 character'
  - a. So, "Starts With \_\_d%" means "Search for any name with 'd' in the 3<sup>rd</sup> position and any number of letters after it."
  - b. Putting a % before and after the name (or using the 'Contains' qualifier) is the best way to search for names because the results will include name combinations such as *-Brown* or *Brown, Jr* or *Brown, III*.

## Additional Resources

Specific information is available for the following pages:

[SGAADVR](#)

[SWCSCHD](#)