Contents

ApplicationNavigator .............................................................................................................................. 3
Key terminology changes ......................................................................................................................... 4
Shortcut Key changes .............................................................................................................................. 4
BasicNavigation ....................................................................................................................................... 5
Page Header ........................................................................................................................................... 5
KeyBlock ............................................................................................................................................... 6
Sections .................................................................................................................................................. 7
Bottom Section Navigation .................................................................................................................... 7
Error Message Types ............................................................................................................................... 8
Required fields ....................................................................................................................................... 9
Sort Order ............................................................................................................................................. 9
Dates ..................................................................................................................................................... 9
Lookup .................................................................................................................................................. 9
Buttons ................................................................................................................................................ 10
Searching/Filtering Data ........................................................................................................................... 11
Multiple Records .................................................................................................................................. 12
Data Export ........................................................................................................................................... 13
Item Properties ..................................................................................................................................... 13
Application Navigator

Application Navigator provides a single interface to seamlessly navigate between Banner 9 JAVA pages and Banner 8 Oracle forms allowing the user to go back and forth between the current Banner forms and the new Banner JAVA pages without needing to remember if a form has been converted.

Access Banner using www.udallas.org/bportal. Sign into the Application Navigator using your network user id and password. You can then use any of the following to navigate within Application Navigator:

- **Toggle Menu icon.** Located in the upper left corner of the application, click on this icon to expand the Banner Menu.

- **Home Page:** By selecting Home Page, you will be returned to the Application Navigator landing page to search for another page.

- **Applications** – Banner, My Banner and Banner Self-Service will be displayed. Each option can be expanded to display a submenu. Find the page you are interested in opening. Select the desired entry and click Enter.

- **Search icon.** Located in the upper left, just to the right of the Menu icon, click on this icon to open the Search window. Enter either the descriptive name of the page or the Banner acronym for the page and a list of pages or subfolders will be displayed on the left.

- **Recently Opened icon.** The Recently Opened icon is located in the upper left, just to the right of the Search icon. It is displayed with a count of pages after you have opened the first page in an application. Open the list and select a page to access it.
**Help Icon:** By selecting this icon, help information is displayed about the page being viewed.

**Sign Out:** It is important to remember to use the Sign Out link in the Application Navigation Toolbars right corner when closing the application instead of just closing your browser to make sure you are logged out of Banner 9.

**Banner User Name:** Displays the Banner Username of the person logged into this session.

**Search box in the center of the page.** In this box, you enter either the descriptive name of the page or the Banner acronym for the page. Find the desired entry and click Enter.

If a Banner page has not yet been transformed, the page will automatically open in Oracle forms. This enables you to continue to do your job, regardless of the page or form you need to access, without signing into different applications.

You can return to the Application Navigator landing page by clicking on the Home icon.

**Application Navigator** has a set of keyboard shortcuts, which you can review by clicking on **Keyboard Shortcuts** in the bottom right corner of the page.

**Key terminology changes**

<table>
<thead>
<tr>
<th>IN BANNER 8</th>
<th>IN BANNER 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORMS</td>
<td>PAGES</td>
</tr>
<tr>
<td>BLOCKS</td>
<td>SECTIONS</td>
</tr>
<tr>
<td>NEXT BLOCK</td>
<td>GO BUTTON</td>
</tr>
<tr>
<td>ROLLBACK</td>
<td>START OVER</td>
</tr>
<tr>
<td>QUERY</td>
<td>FILTER</td>
</tr>
</tbody>
</table>

**Shortcut Key changes**

<table>
<thead>
<tr>
<th>Banner 8</th>
<th>Banner 9</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shortcut Key</strong></td>
<td><strong>Shortcut Key</strong></td>
</tr>
<tr>
<td>Next Block</td>
<td>Cnrl + PgDn</td>
</tr>
<tr>
<td>Previous Block</td>
<td>Cnrl + PgUp</td>
</tr>
<tr>
<td>Rollback</td>
<td>Shift + F7</td>
</tr>
</tbody>
</table>
Basic Navigation

The basic navigation of each page includes the page header, notification center, key block, sections, and buttons.

**Page Header**

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

- **Page close icon**

Page title, which is formatted according to the preferences established on the User Preference (GUAUPRF) page.

**Add** and **Retrieve** icons, which are used with Banner Document Management.

**Related** Menu, which displays a list of pages that can be accessed from this page (Options Menu in Banner 8).

**Tools** Menu, which includes refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.

**Notification Center** located to the right of the Tools menu and displays the following types of information as needed:

- Successful save of data
- Warning messages
- Error messages
- Informational messages
- Number of messages to be corrected to continue in the page

You can click in the box with the number in the page header to open or close the Notification Center.
**Key Block**

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

When the cursor is in the key block, the fields that can be entered in the key block are enabled. When you leave the key block, the fields in the key block are disabled.

When the cursor is in the key block, the information is displayed in a column format. When you leave the key block by clicking the **Go** button, the data is rearranged into a linear format.

- **Lookup** button next to the field indicates that the field has the lookup feature. An **Option List** may be displayed showing multiple ways to search. After Option is selected, a query can be built to search further with additional fields. See **Searching/Filtering Data** for information to build the query to search for requested information.

- **Generate ID** button allows individuals who have security access to generate a new record assigning the next available ID.

**Go** accesses the body of the page after the key block data is populated.

**Start Over** returns to the key block if you are in the body of a page.
Sections

Pages are divided into sections that contain additional details for the key information. A section can represent one record or multiple records depending on the type of information that you are working on. Each section contains related information.

Sections of data are accessed by scrolling up and down the page. They can be opened or collapsed by clicking on the arrow on the far left side of the section header. Some sections are accessed by using tabs that group information in a meaningful way.

If available, the sections can have a header that includes icons for the following actions:

- **Insert.** Use this to insert records in the section.
- **Delete.** Use this to delete records in the section.
- **Copy.** Use this to copy records in the section.
- **Filter.** Use this to filter records in the section. See **Searching/Filtering Data** section for additional information

**More Information** – This will appear if supplemental data can be entered for the record. This icon is displayed with a check mark if supplemental data already exists for the record

One record at a time: Use pagination controls located at bottom right of section to move from record to record

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**Bottom Section Navigation**

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

1. **Previous Section button:** will take to backwards in the sections (Alt+PageUp)
2. **Next Section button:** will take you to the next section of the page (Alt+PageDown)
3. **Activity Date:** current system time – this would be the time stamped for the record if created or modified
4. **Activity User:** Name of account user creating or modifying the record
5. **Save button:** this is the button you will use to save your data

Another Bottom section Navigation style: you will see this one when using the search function

Always check your section areas for the different navigation functions and buttons.
Error Message Types

There are four message notification component types that you may see when working in Banner 9:

1. **Error Notification** – will display a “!” in a circle when message displayed

   ![Error Messages – Red]
   “ERROR” Pay Event Overlaps With Payroll Year: 2017 Pay Id: BW Pay Number: 2

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

   ![Informational Messages – Blue]
   Banner
   No matches found, create as new?
   [Yes] [No]

3. **Success Notification** – will display a checkmark in a circle when message displayed

   ![Successful save of data – Green]
   Saved successfully (1 rows saved)

4. **Warning Notification** – will display an exclamation “!” in a yield sign when message displayed. Will also display two buttons a Yes button and a No button select one to continue.

   ![Warning Messages – Yellow]
   New ID Created
   Generated ID: R01300101. Identification record created. Biographical record not created. Address record create failed. Telephone record not created. E-mail record not created. Additional ID not created.
   [OK]
**Required fields**

An asterisk (*) displayed next to a field name indicates that the field requires a value before you continue on the page. The system uses the definition of the field as it is used in the application to determine if it is required. For fields that have conditional logic that determines whether they are required, the asterisk (*) is not displayed. If you leave a section or a page without entering information in a required field, the page notifies the individual in the Notification Center, requiring the user to perform some additional action.

**Sort Order**

In a grid layout, values for a field can be sorted, and if you have chosen to sort the data, an up or down arrow next to the field name indicates the current sort order for the field. You can click the field label to reverse the sort order.

**Dates**

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

**Lookup**

The Lookup feature allows you to quickly look up a value for a field. The **Lookup** button next to a field indicates that the field has the Lookup feature.

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

Banner transformation includes several buttons.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add and Retrieve</td>
<td>Use the Add and Retrieve buttons to interact with Banner Document Management (xTender) to properly store and review documents.</td>
</tr>
<tr>
<td>Go</td>
<td>Use the Go button to advance to the body of the page after populating the key block.</td>
</tr>
<tr>
<td>Save</td>
<td>Use the Save button to save changes on the page. The Save button is located on the bottom right side of the page.</td>
</tr>
<tr>
<td>Section Navigation</td>
<td>Use the Next Section button to navigate to the next section of data. Use the Previous Section button to navigate to the previous section of data. The Next Section and Previous Section buttons are located at the bottom left of each page.</td>
</tr>
<tr>
<td>Select and Cancel</td>
<td>Use the Select button to select and retrieve data from a called page to the current page. Use the Cancel button to return to the called page without retrieving any data. When you need to go to a secondary or called page to retrieve data, the Select and Cancel are presented at the bottom of the page.</td>
</tr>
<tr>
<td>Start Over</td>
<td>Use the Start Over button to return to the key block of the page.</td>
</tr>
</tbody>
</table>
Searching/Filtering Data

You can filter data in a section if there is an active Filter icon in the section header. Use the following steps to filter data in a section.

Procedure

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

2. Choose the field you want to filter from the Add Another Field drop-down list.

3. Choose an operator from the Contains drop-down list. The available operators depend on the type of field (numeric, alphanumeric, date, 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 codes “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 field that you selected.

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 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.

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 right corner of the filter window to close the filter.
Multiple Records

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

- **In a grid.** In this instance the data is presented 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.
Data Export

You can export data from a transformed Banner page to an Excel spreadsheet (.xls) by clicking Tools > Export.

Item Properties

Item Properties lists 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. The specific properties that are displayed depend on the type of field. To display Item Properties for a field, place the cursor in the field and select Tools > Item Properties.
<table>
<thead>
<tr>
<th>Banner 8 Icon</th>
<th>Banner 8 Keyboard</th>
<th>Banner 8 Menu</th>
<th>Explanation</th>
<th>Banner 9 Icon</th>
<th>Banner 9 Keyboard</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Save Icon" /></td>
<td><strong>Save</strong> (F10)</td>
<td>File, Save</td>
<td>Saves all changes made in a form since the last time you saved. Banner also refers to save as <strong>Commit</strong> in some messages.</td>
<td><img src="image" alt="SAVE Icon" /></td>
<td><strong>Save</strong> (F10) Lower right hand corner of screen</td>
</tr>
<tr>
<td><img src="image" alt="Rollback Icon" /></td>
<td><strong>Rollback</strong> (Shift+F7)</td>
<td>File, Rollback</td>
<td>Clears all information and returns you to the Key Block of a form.</td>
<td><img src="image" alt="Start Over Icon" /></td>
<td><strong>Rollback/Refresh</strong> (F5)</td>
</tr>
<tr>
<td><img src="image" alt="Select Icon" /></td>
<td><strong>Select</strong> (Shift+F3)</td>
<td>File, Select</td>
<td>Enters the highlighted value into the current field of the form you are working from. List of values uses <strong>OK</strong> as the select.</td>
<td><img src="image" alt="SELECT Icon" /></td>
<td><strong>SELECT</strong></td>
</tr>
<tr>
<td><img src="image" alt="Insert Record Icon" /></td>
<td><strong>Insert Record</strong> (F6)</td>
<td>Record, Insert</td>
<td>Inserts a new blank record into a group of existing records.</td>
<td><img src="image" alt="Insert Icon" /></td>
<td><strong>Insert Record</strong> (F6)</td>
</tr>
<tr>
<td><img src="image" alt="Remove Record Icon" /></td>
<td><strong>Remove Record</strong> (Shift+F6)</td>
<td>Record, Remove</td>
<td>Removes all information for the record. When you Save, the record will be deleted from the database.</td>
<td><img src="image" alt="Delete Icon" /></td>
<td><strong>Remove Record</strong> (SHIFT+F6)</td>
</tr>
<tr>
<td><img src="image" alt="Previous Record Icon" /></td>
<td><strong>Previous Record</strong> (Up Arrow)</td>
<td>Record, Previous</td>
<td>Moves the cursor to the first enterable field in the previous record.</td>
<td><img src="image" alt="Previous Record Icon" /></td>
<td><strong>Previous Record</strong> (UP ARROW)</td>
</tr>
<tr>
<td><img src="image" alt="Next Record Icon" /></td>
<td><strong>Next Record</strong> (Down Arrow)</td>
<td>Record, Next</td>
<td>Moves the cursor to the next enterable field in the next record. If the cursor is at the last record, a new record is created.</td>
<td><img src="image" alt="Next Record Icon" /></td>
<td><strong>Next Record</strong> (DOWN ARROW)</td>
</tr>
<tr>
<td><img src="image" alt="Previous Block Icon" /></td>
<td><strong>Previous Block</strong> (Ctrl+Pg Up)</td>
<td>Block, Previous</td>
<td>Moves the cursor to the previous information block in a form.</td>
<td><img src="image" alt="Previous Block Icon" /></td>
<td><strong>Previous Block/Section</strong> (ALT+PG UP)</td>
</tr>
<tr>
<td><img src="image" alt="Next Block Icon" /></td>
<td><strong>Next Block</strong> (Ctrl+Pg Down)</td>
<td>Block, Next</td>
<td>Moves the cursor to the next information block in a form. If the next block is in another window of the form, that window will be opened.</td>
<td><img src="image" alt="Next Block Icon" /></td>
<td><strong>Next Block/Section</strong> (ALT+PG DOWN)</td>
</tr>
<tr>
<td><img src="image" alt="Enter Query Icon" /></td>
<td><strong>Enter Query</strong> (F7)</td>
<td>Query, Enter</td>
<td>Puts the form into query mode and lets you enter search criteria to see what information is already in the database. Opens new form to add fields for querying – more options.</td>
<td><img src="image" alt="Enter Query Icon" /></td>
<td><strong>Enter Query/Filter</strong> (F7)</td>
</tr>
<tr>
<td><img src="image" alt="Execute Icon" /></td>
<td><strong>Execute</strong> (F8)</td>
<td>Query, Execute</td>
<td>In query mode, searches the database and displays any records that match the search criteria.</td>
<td><img src="image" alt="Execute Icon" /></td>
<td><strong>Execute Query/Filter</strong> (F8)</td>
</tr>
<tr>
<td>Banner 8 Icon</td>
<td>Banner 8 Keyboard</td>
<td>Banner 8 Menu</td>
<td>Explanation</td>
<td>Banner 9 Icon</td>
<td>Banner 9 Keyboard</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------</td>
<td>---------------</td>
<td>-------------</td>
<td>---------------</td>
<td>-----------------</td>
</tr>
<tr>
<td><img src="image" alt="Cancel" /></td>
<td>Cancel (Ctrl+Q)</td>
<td>Query, Cancel</td>
<td>Cancels a query and takes a form out of query mode.</td>
<td><img src="image" alt="CANCEL" /></td>
<td>Cancel (CTRL+Q)</td>
</tr>
<tr>
<td><img src="image" alt="View/Send Message" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Print" /></td>
<td>Print (Shift+F8)</td>
<td>File, Print</td>
<td>Captures the active screen (only what you can see) and prints it to your local printer.</td>
<td><img src="image" alt="TOOLS" /></td>
<td>Actions/Print</td>
</tr>
<tr>
<td><img src="image" alt="Online Help" /></td>
<td>Online Help (F1)</td>
<td>Help, Online Help</td>
<td>Displays the Help window for the current field</td>
<td></td>
<td>Help (CTRL+SHIFT+L)</td>
</tr>
<tr>
<td><img src="image" alt="Exit" /></td>
<td>Exit (Ctrl+Q)</td>
<td>File, Exit</td>
<td>In a menu, the Exit command takes you out of Banner. In a form, the Exit command takes you out of the form. In a query mode, the Exit command cancels the query.</td>
<td><img src="image" alt="Exit" /></td>
<td>Exit (CTRL + Q)</td>
</tr>
<tr>
<td><img src="image" alt="F5" /></td>
<td>F5</td>
<td>File, Direct Access</td>
<td>Activates a “Go To…” window, where users can navigate to another form without having to return to the main menu.</td>
<td><img src="image" alt="Search" /></td>
<td>Search (CTRL+SHIFT+Y)</td>
</tr>
<tr>
<td><img src="image" alt="F9" /></td>
<td>F9</td>
<td>List of values</td>
<td>Lookup Values</td>
<td><img src="image" alt="List of values" /> (F9)</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="F4" /></td>
<td>F4</td>
<td>Record, Duplicate</td>
<td>Copy Record</td>
<td><img src="image" alt="Copy" /></td>
<td>Copy Record (F4)</td>
</tr>
<tr>
<td><img src="image" alt="F3" /></td>
<td>F3</td>
<td>Options, form</td>
<td>Drills down on some forms</td>
<td><img src="image" alt="Drills Down on some forms" /> (F3)</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Options menu" /></td>
<td>Options menu</td>
<td>Related Forms</td>
<td>Related (ALT+SHIFT+R)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Toggle Menu" /></td>
<td>Toggle Menu</td>
<td>Brings up Banner Main Menu</td>
<td>Toggle Menu (CTRL+M)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Toggle Open Applications" /></td>
<td>Toggle Open Applications</td>
<td>Forms previously opened in Banner</td>
<td>Toggle Open Applications (CTRL+Y)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>