

Banner Navigation

Version 9

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Table of Contents

Training Session Pre-Work.....	4
Chapter 1: Banner Introduction	4
Chapter 2: Banner Forms	4
Chapter 3: General Menu and Navigation	4
Chapter 1: Banner Introduction	5
What is Banner?	5
Banner Structure	5
Naming Convention	6
Position 1	6
Position 2	6
Position 3	6
Positions 4, 5, 6, 7	6
How to Log In.....	7
Navigating the Banner 9 Home Page	9
Chapter 2: Banner Forms.....	10
Parts of a Form.....	11
Blocks	12
Field.....	15
Records	18
Dialog and Alert Boxes.....	21
Types of Forms	22
Query.....	22
Application forms.....	23
Chapter 3: General Menu and Navigation	24
Menu Bar	24
Chapter 4: Accessing and Filtering Data	25
Multiple Records	28
One record at a time.....	28
In a grid.....	28

Advanced Features	29
Item Properties	29
Chapter 5: My Banner and My Links.....	32
My Banner	32
Creating your My Banner	32
Editing your My Banner	34
Appendix	35
Naming Conventions	35
Buttons.....	39
Banner Keyboard Shortcuts.....	40
Service Desk Request	42
Submitting a Ticket.....	42
Call the ITS Service Desk (901.678.8888) any day of the week!	42
Important Links	42

Purpose

This course will help users develop a better understanding of how to navigate Banner, search within the system, and customize areas of the system. It will not discuss customized knowledge of individual modules (such as HR, Finance, etc.....).

Audience

Banner Navigation is designed for university faculty and staff with basic computer skills.

Learning Outcomes

On completion of this course, you will be able to:

- Have a better understanding of Banner's structure, Main Menu, and forms
- Identify key components within the Banner
- Navigate in Banner using a variety of methods
- Use a variety of search methods
- Customize the My Banner and My Links areas

Training Session Pre-Work

Before attending the Banner Navigation training class, please familiarize yourself with the following chapters of this training manual.

This information provides a foundation for the training. If you have any questions regarding the material, time will be provided at the beginning of class.

Chapter 1: Banner Introduction

- This chapter will discuss what Banner is, its structure, and the proper way to log into the system.
- Banner's standard naming convention is covered.

Chapter 2: Banner Forms

- The different parts of a form are presented, along with the most commonly used types of forms.

Chapter 3: General Menu and Navigation

- An in-depth look at the Banner environment and its organization.

Chapter 1: Banner Introduction

What is Banner?

Banner is a Web-based administrative software application developed specifically for higher education institutions by Sungard Higher Education.

Banner provides an online environment that allows users to perform administrative functions efficiently. Data is entered into a database, integrated, and shared among different departments across the University.

Banner Structure

Banner is organized as a hierarchy. The Banner hierarchy includes:

- Suite
- Systems
- Modules
- Forms
- Fields

Naming Convention

All Banner objects (forms, reports, jobs, and tables) have seven-character names that follow the naming convention outlined below. Objects are usually referred to by this seven-character name/abbreviation rather than their long title.

* See the Appendix for a list of all the Position codes for all products and modules *

Name:	S	P	A	I	D	E	N
Position:	1	2	3	4	5	6	7

Position 1

- Identifies the product owning the form, report, process, or table.
- In the case of the SPAIDEN form, the first letter, S, refers to Student.

Position 2

- Identifies the application module owning the form, report, process, or table.
- Unique to the product identified in position 1.
- In the case of the SPAIDEN form, the second letter, P, refers to General Person.

Position 3

- Identifies the type of form, report, process, or table.
- Codes are the same for all Banner modules.
- In the case of the SPAIDEN form, the third letter, A, refers to an Application form.

Positions 4, 5, 6, 7

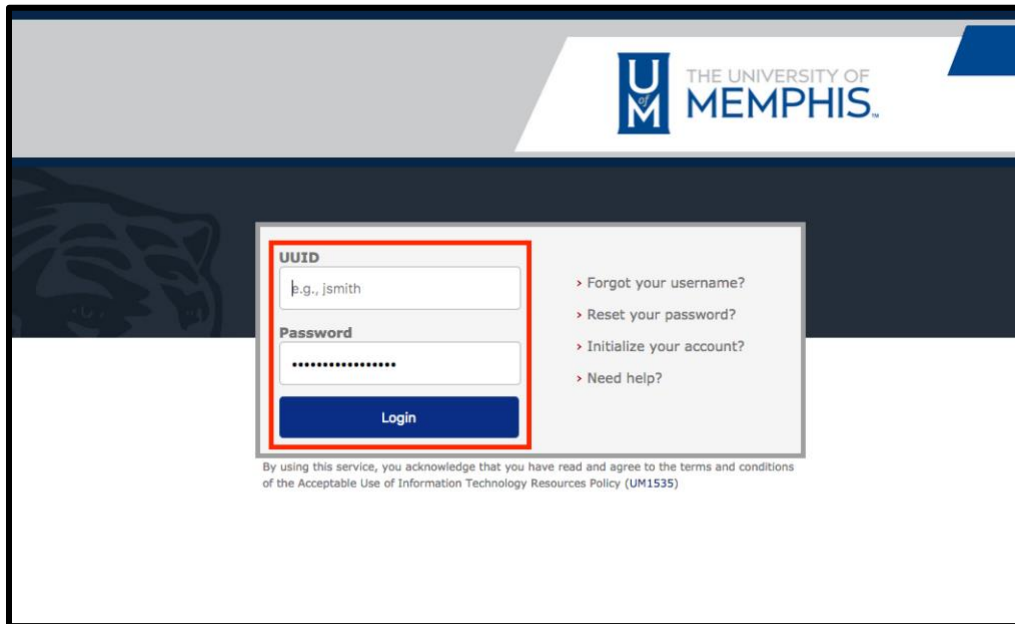
- Identifies a unique four-character code for the form, report, process, or table.
- In the case of the SPAIDEN form, the last four letters, IDEN, refer to Identification.

Note: The SPAIDEN form from the student system will continue to be an example throughout this manual. However, all the steps and information discussed can be transferred across all systems, modules, forms, etc.

How to Log In

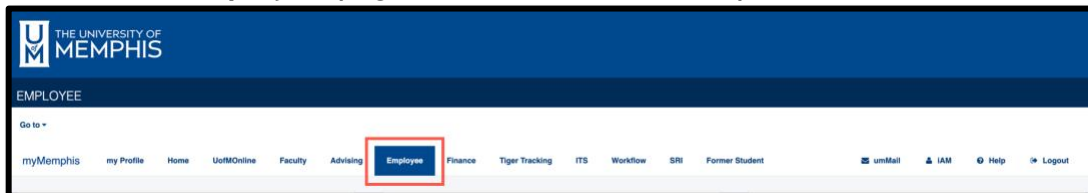
Banner is accessed via the University of Memphis portal at <http://my.memphis.edu> .

1. Using Internet Explorer, go to the Portal website.
2. Enter your UUID (*User Name*) and *Password*, click **Login**.



The screenshot shows the University of Memphis login portal. At the top right is the university logo. On the left is a tiger head graphic. The central login area has a red box around the 'UUID' and 'Password' input fields and the 'Login' button. The 'UUID' field contains the text 'e.g., jsmith'. To the right of the input fields are links: '> Forgot your username?', '> Reset your password?', '> Initialize your account?', and '> Need help?'. Below the input fields is a small disclaimer: 'By using this service, you acknowledge that you have read and agree to the terms and conditions of the Acceptable Use of Information Technology Resources Policy (UM1535)'.

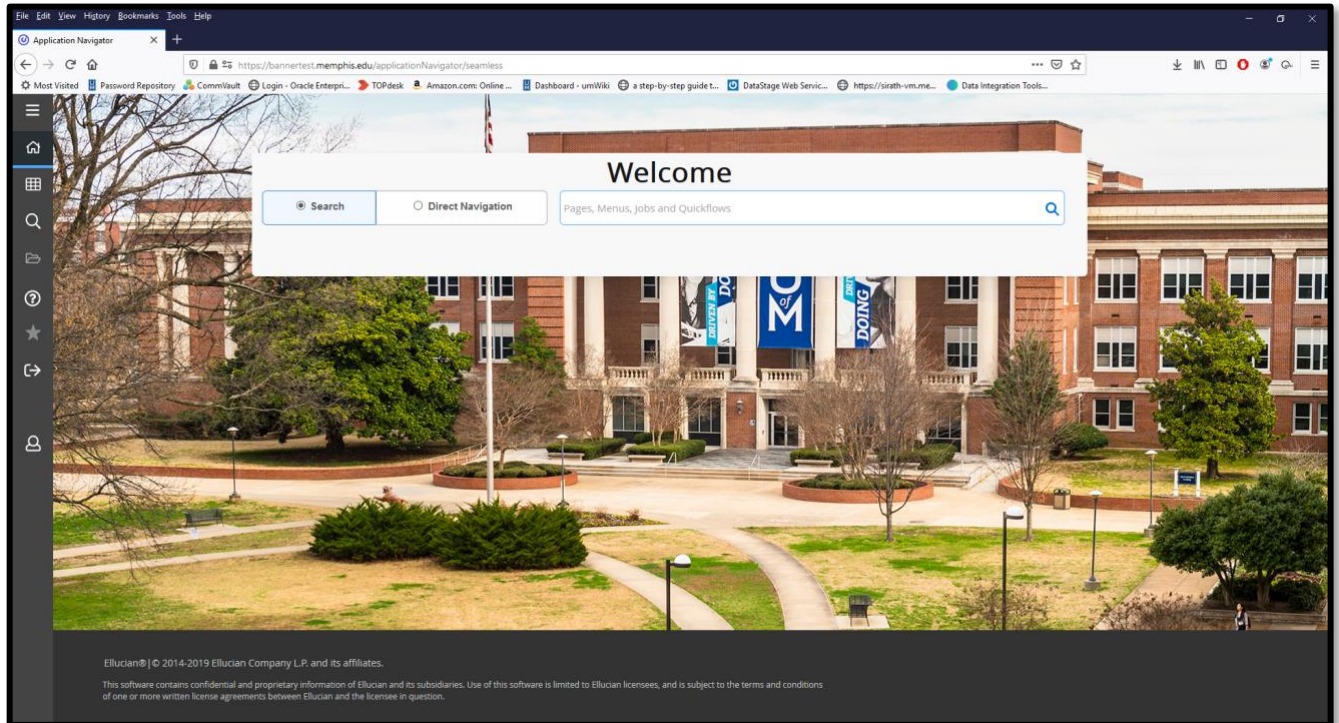
3. Click on the **Employee** page and find the Banner 9 portlet.



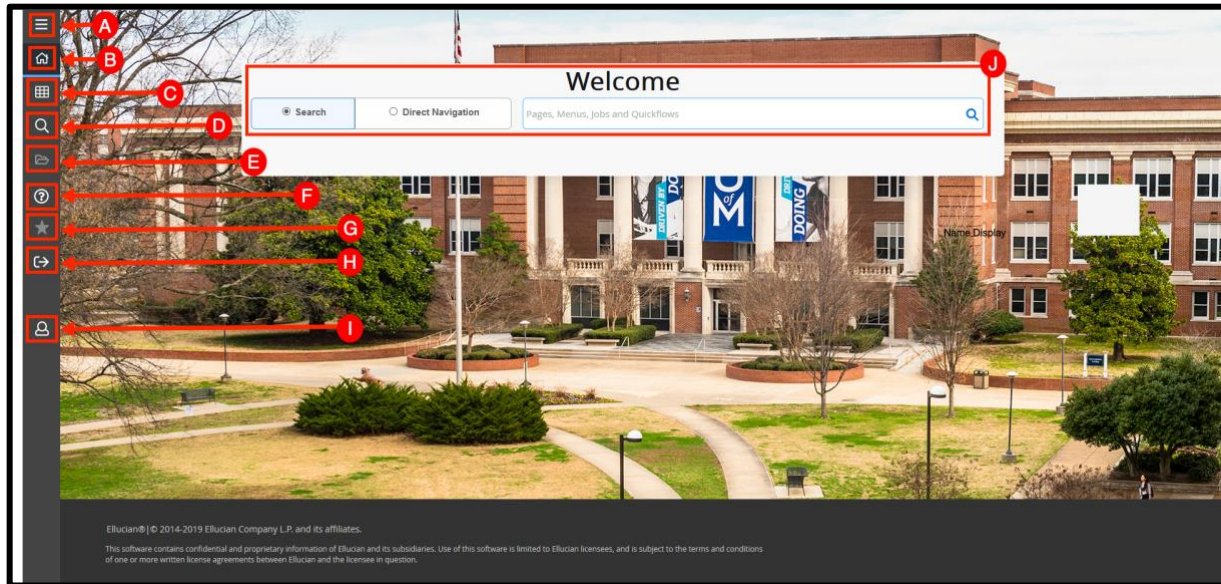
4. Next, scroll down and look to the left for the Banner Admin Pages portlet. Click **Admin Pages**.



5. Once logged in, you will see the new interface of Banner 9.



Navigating the Banner 9 Home Page



- A. **Menu Icon** - The Menu icon is located in the upper left corner of the application. Click on this icon to open the Banner Menu. Find the page you are interested in opening. Select the desired entry and click Enter.
- B. **Home Button Icon** - Click this icon to return to the Banner 9 home page.
- C. **Applications** - Links to Applications available within Banner 9.
- D. **Search Icon** - The Search icon is located in the upper left, just to the right of the Menu icon. Click on this icon to open the Search window. You can then enter either the descriptive name of the page or the Banner acronym for the page in the Search box at 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.
- E. **Recently Opened Icon**—The Recently Opened icon is in the upper left, just to the right of the Search icon. It displays a count of pages opened after you have opened the first page of an application. Open the list and select a page to access it.
- F. **Help Icon** - Click this icon to view documentation.
- G. **Bookmarked Pages** icon - Click to view bookmarked pages.
- H. **Sign Out Icon** - Click this icon to Sign out of Banner 9.
- I. **Name Display Icon** - Displays the user's name logged into Banner 9.
- J. **Welcome Search Panel** - Allows search of pages, menus, jobs, and workflows.

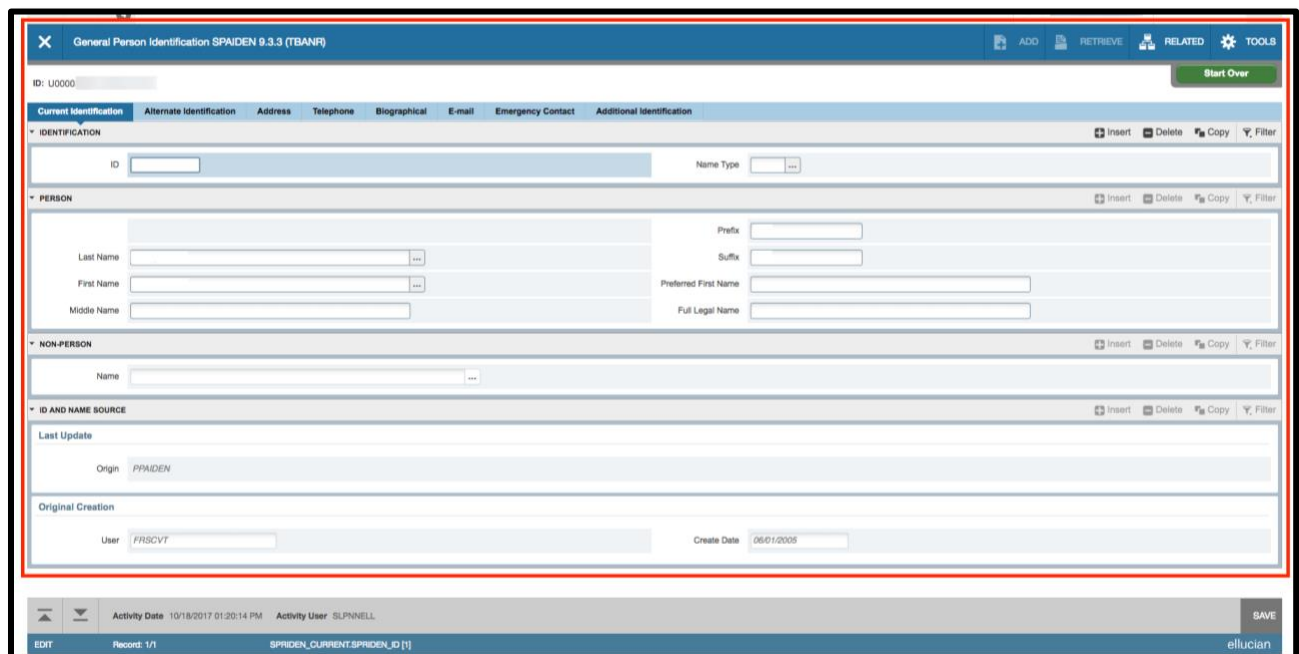
Chapter 2: Banner Forms

The Banner environment includes a variety of objects (forms, reports, jobs, and tables). However, the most used object, which you will likely come across first, is the form. We will focus on the form in the Banner Navigation class.

A form is an online document where you can enter and look up information in the database. A form visually organizes information so it is easier to enter and read. A Banner form is like a paper form, except the information is entered once and used by other forms, reports, and jobs.

Forms can include windows, dialog boxes, and alert boxes.

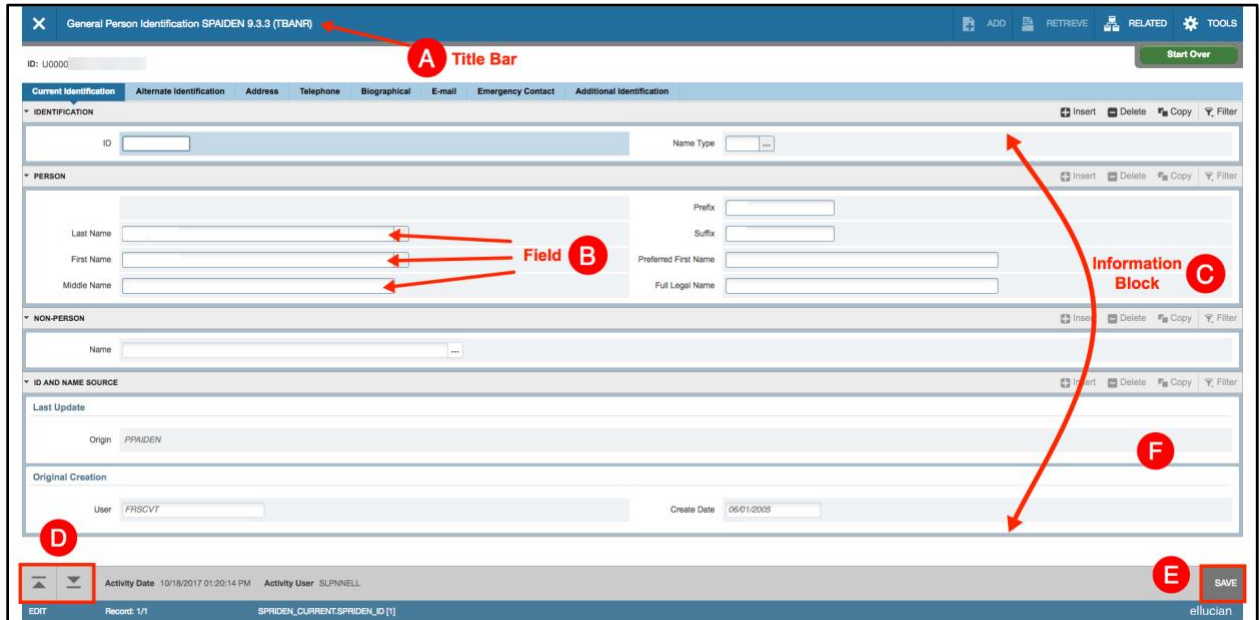
For example, in the picture below, the red box outlines the SPAIDEN form.



The screenshot displays the 'General Person Identification SPAIDEN 9.3.3 (TBAIR)' form. The form is organized into several sections, each with a tabbed interface. The 'Current Identification' tab is active, showing fields for 'ID' (U0000) and 'Name Type'. Below this, the 'PERSON' section contains fields for 'Last Name', 'First Name', 'Middle Name', 'Prefix', 'Suffix', 'Preferred First Name', and 'Full Legal Name'. The 'NON-PERSON' section has a 'Name' field. The 'ID AND NAME SOURCE' section includes 'Last Update', 'Origin' (PPAIDEN), 'Original Creation', 'User' (FRSCVT), and 'Create Date' (06/01/2005). The form is outlined with a red border. At the bottom, there is a status bar with 'Activity Date' (10/18/2017 01:20:14 PM), 'Activity User' (SLPANEL), and a 'SAVE' button. The footer indicates 'umTech 10 | Page'.

Parts of a Form

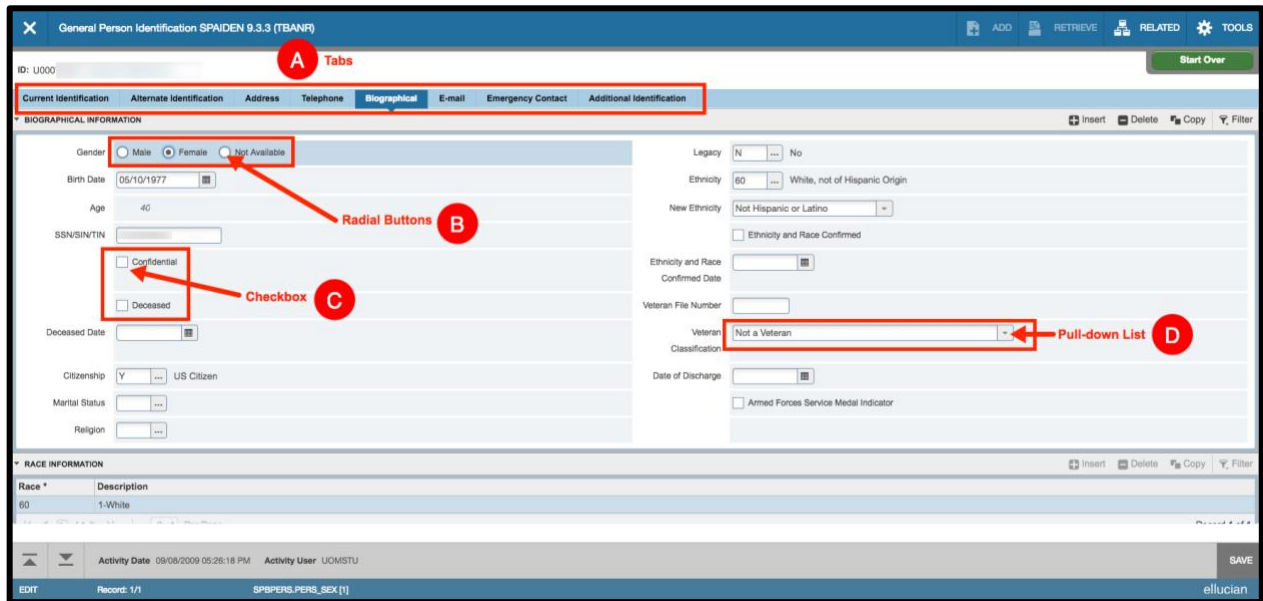
A form is composed of multiple parts, some of which cannot be seen on all forms. These parts will be described below.



The screenshot shows a web-based form titled "General Person Identification SPAIDEN 9.3.3 (TBANR)". The form is divided into several sections: "IDENTIFICATION", "PERSON", "NON-PERSON", and "ID AND NAME SOURCE". Annotations point to specific parts of the form:

- A. Title Bar:** Points to the top blue bar containing the form title and navigation buttons (ADD, RETRIEVE, RELATED, TOOLS).
- B. Field:** Points to the input fields for "Last Name", "First Name", and "Middle Name" in the "PERSON" section.
- C. Information Block:** Points to the "Name Type" dropdown and the "Prefix", "Suffix", "Preferred First Name", and "Full Legal Name" fields in the "PERSON" section.
- D:** Points to the "Previous Record" and "Next Record" buttons at the bottom left.
- E:** Points to the "SAVE" button at the bottom right.
- F:** Points to the "ID AND NAME SOURCE" section, which includes fields for "Last Update", "Origin", "Original Creation", "User", and "Create Date".

- A. Title Bar:** This bar may display the form's descriptive name, the seven-character ID name, the software version number, and the database name.
- B. Field -** Area on a form where you can enter, query, change, and display specific information.
- C. Information Block—**This area is where you enter information prior to updating a record. It displays data about the information entered in the Key Block.
- D.** Next Record or Previous Record buttons.
- E.** Save button.



- A. Tabs**—Tabs arrange information meaningfully and allow users to navigate easily between groups or blocks of information.
- B. Radial Button** - Used to select one of several options. Only one radial button can be selected at a time.
- C. Checkbox** - Used to enable or disable features or options.
- D. Pull-down list** - Used to select a field value from a list of pre-defined values. A down arrow on the right side of the field indicates that the field has a pull-down list.

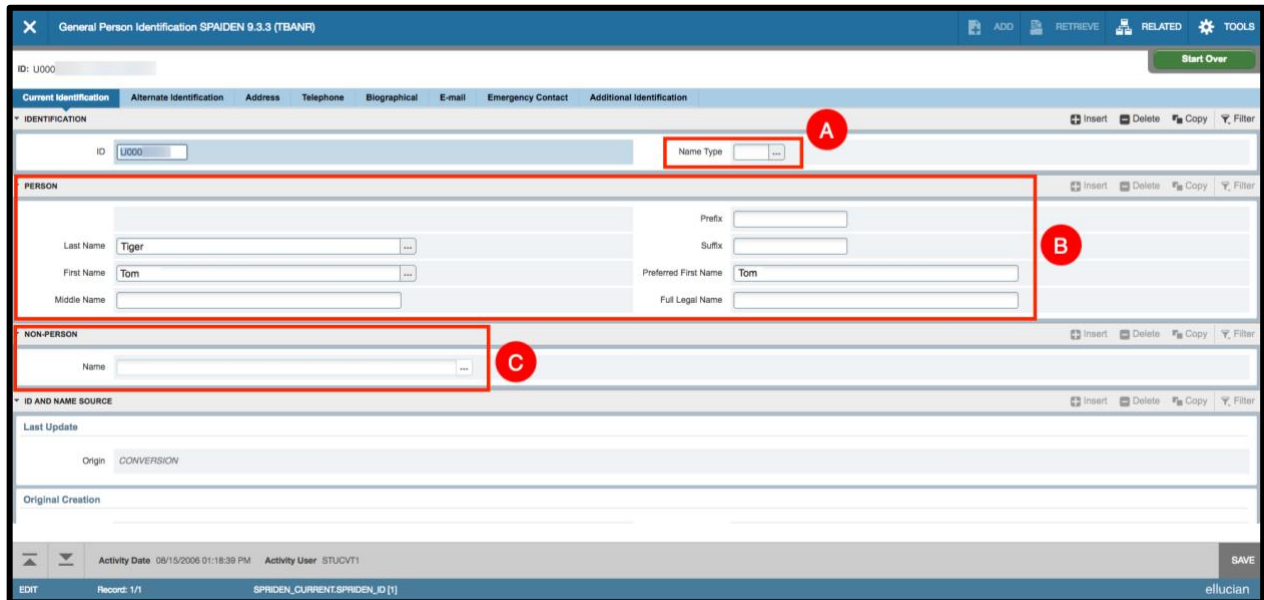
Blocks

A block is a form or window section containing related information. If a form or window contains more than one block, each block (except the key block) may be enclosed in a beveled box.

Blocks:

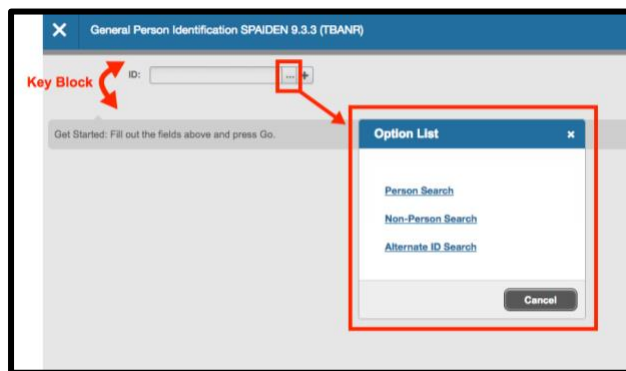
- Group information together
- It can be one or more on a screen
- It may be organized on tabs within a form
- Think of them as “sections” on a form

For example, a student's record in SPAIDEN contains the following blocks: (A) Current Identification, (B) Person Name Information, and (C) Non-Person Information.



There are two types of blocks: a Key Block and an Information Block.

Key Block:

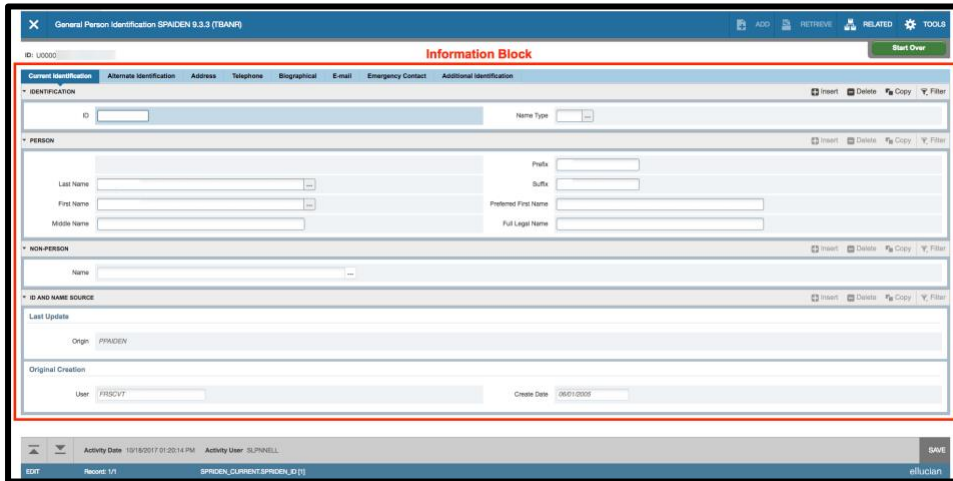


The place you start on a form.

- Every form has a Key block.
- A unique code is entered, such as an ID number, term code, or document number.
- Let Banner know what piece of information you want to retrieve.

- The rest of the information on the form will refer to the information you enter on the Key block.

Information Block:



The screenshot shows a web-based form titled "General Person Identification SPAIDEN 9.3.3 (TBANK)". The "Information Block" section is highlighted with a red border. It contains the following fields:

- ID:** A text input field with the value "U0000".
- Name Type:** A dropdown menu.
- PERSON:** A section containing:
 - Last Name:** A text input field.
 - First Name:** A text input field.
 - Middle Name:** A text input field.
 - Prefix:** A text input field.
 - Suffix:** A text input field.
 - Preferred First Name:** A text input field.
 - Full Legal Name:** A text input field.
- NON-PERSON:** A section containing:
 - Name:** A text input field.
- ID AND NAME SOURCE:** A section containing:
 - Last Update:** A text input field.
 - Origin:** A text input field with the value "PRADEN".
 - Original Creation:** A text input field.
 - User:** A text input field with the value "PRSCVT".
 - Create Date:** A text input field with the value "06/01/2008".

The form also includes a "Start Over" button in the top right corner and a "SAVE" button in the bottom right corner. The bottom status bar shows "Activity Date: 10/16/2017 01:20:14 PM" and "Activity User: SPINELL".

- Section that contains related information to what was entered in the Key block.
- A line may separate each Information block on the form.

Navigating Blocks:

To navigate between blocks or tabs, you would use the Next Block or Previous Block functions. These are icons located on the toolbar in a form. If you prefer to use keystrokes for navigation, you can use Ctrl-Page Down to reach the Next Block or Ctrl-Page Up for the Previous Block.

Previous Block



Next Block

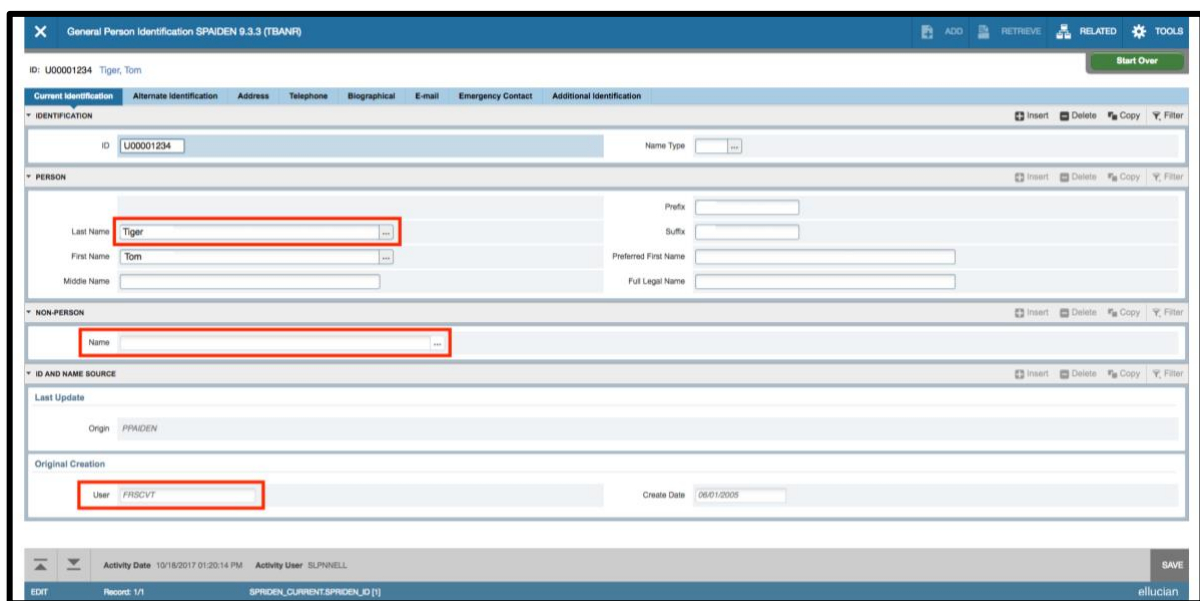


Field



Fields are labeled spaces within a block. You can enter, query, change, and display specific information within a field.

A form will have more than one field. Below is an example of a form, and some of its fields have been marked as examples.



Field States:

A field can be in one of two states on a form: Enabled or Disabled.

Enabled

- A cursor is allowed in the field.
- Information in the field is displayed in black text.

Disabled

- A cursor is not allowed in the field.
- If information exists, it cannot be changed.

Note: You may be unable to navigate all fields within a form. You frequently cannot move through any fields on query-only forms.

Field Values:

Any data entered or displayed in a field is a value. The chart below details two types of values.

Note: The names of the fields that have a pre-defined value, or LOV, have a drop-down arrow next to the field. Fields that you can search for a value in the database also have a drop-down arrow next to the field. The most common example is the ID field on the %Iden forms.



Citizenship	Y	...	US Citizen
Marital Status	M	...	Married
Religion	NO	...	No Preference

Type: Description

Example

Free-format: Free access to type in whatever information is required. Not previously defined on a validation form.

Ex. Street addresses

List of Values (LOV): Data on the LOV comes from previously defined values on a validation form. When you double-click on a LOV field. Use a Search icon or press the F9 key, previously defined values are displayed.

Ex. State codes - FL, PA, DE.

Search Field: If a field is a search field you must click the search icon to search.

Ex. ID, Last Name, First Name.

Navigating Fields:

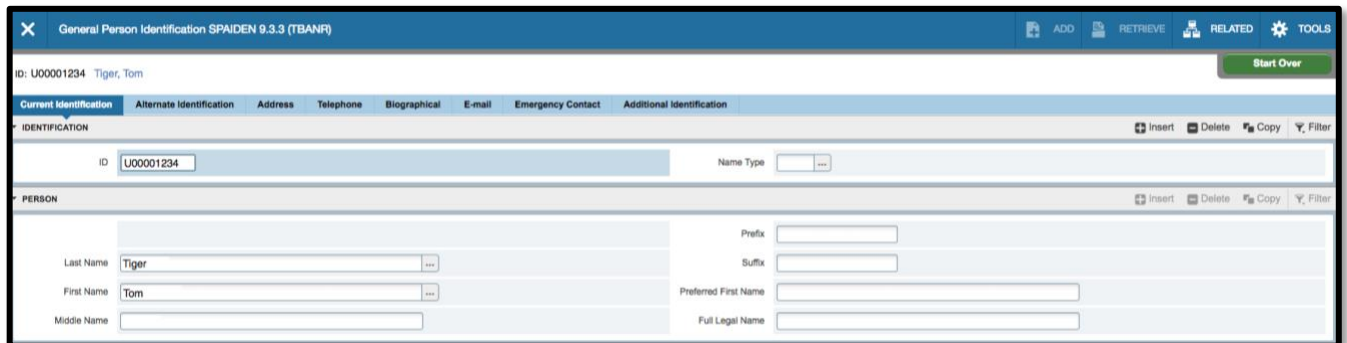
To navigate between fields, use the next and previous field keystrokes as detailed below. To go to the Next Field, hit the Tab or Enter Key; to go to the Previous Field, enter the Shift + Tab keys.

Note: You may also navigate between fields using the item pull-down menu on the menu bar.

Records

A record is a group of fields that make up a logical unit. There may be more than one record in a block.

Example: A person's record consists of several fields: ID, Last Name, First Name, Middle Name, Birth Date, and Name Type.



General Person Identification SPAIDEN 9.3.3 (TBANF)

ADD RETRIEVE RELATED TOOLS

ID: U00001234 Tiger, Tom Start Over

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

IDENTIFICATION Insert Delete Copy Filter

ID U00001234 Name Type

PERSON Insert Delete Copy Filter

Last Name Tiger Prefix

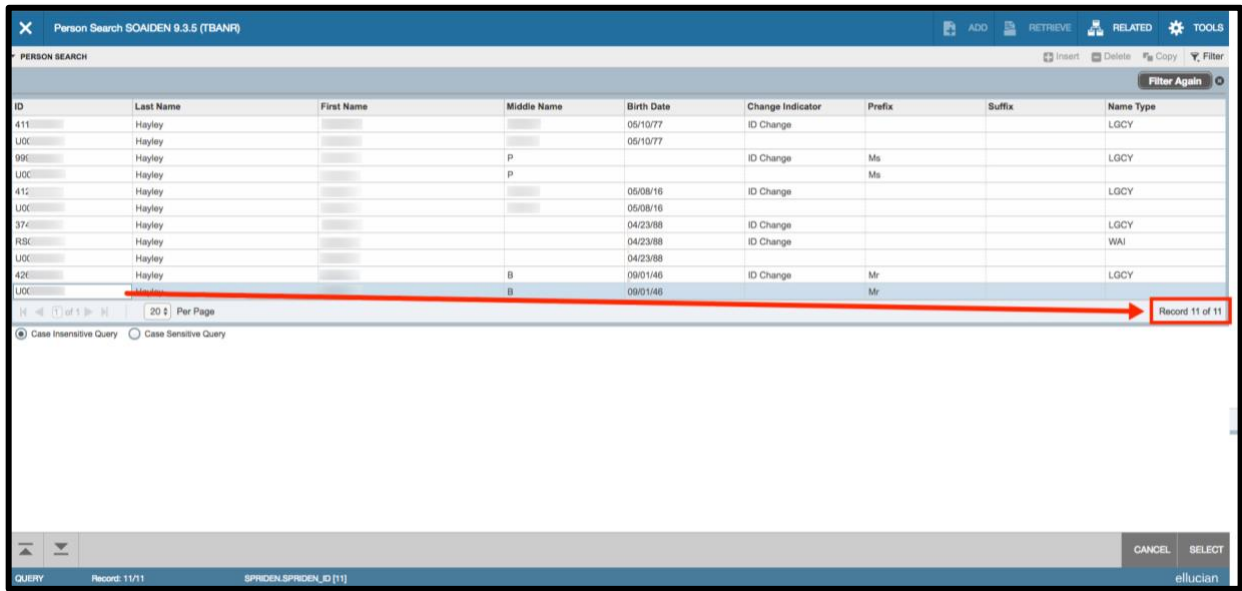
First Name Tom Suffix

Middle Name Preferred First Name

Full Legal Name

Record counter:

The record counter displays the number of records viewed and the number of total records.



ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
411	Hayley			05/10/77	ID Change			LGCY
U0C	Hayley			05/10/77				
99C	Hayley		P		ID Change	Ms		LGCY
U0C	Hayley		P			Ms		
41C	Hayley			05/08/16	ID Change			LGCY
U0C	Hayley			05/08/16				
37C	Hayley			04/23/88	ID Change			LGCY
RSC	Hayley			04/23/88	ID Change			WAI
U0C	Hayley			04/23/88				
42C	Hayley		B	09/01/46	ID Change	Mr		LGCY
U0C	Hayley		B	09/01/46		Mr		





Record 11 of 11

Note: A question mark in the status line signifies more records, but you have not gotten to the last one, so the computer does not know how many there are yet.

Record 11 of 11

Viewing Records:

Some forms have a scroll bar to view existing records.

 ADD  RETRIEVE  RELATED  TOOLS					
Birth Date	Change Indicator	Prefix	Suffix	Name Type	
10/21/72	Name Change	Ms		CORR	
05/10/89	Name Change			CORR	
03/08/80	ID Change	Ms		LG CY	
03/08/80	Name Change	Ms		CORR	
04/27/71	Name Change			FORM	
10/23/97	ID Change			WAI	
10/23/97	Name Change			CORR	
02/22/85	Name Change			CORR	
04/30/88	Name Change	Mr		CORR	
03/30/96	Name Change			CORR	
03/30/96	ID Change			WAI	
11/25/88	Name Change			CORR	
11/25/88	ID Change			WAI	
06/03/85	Name Change		Jr	FORM	

Navigating Records:

You can navigate to different records one of three ways:

- Use the functions located on the toolbar in a form.
 - Next Record



- Previous Record



- Use the record pull-down menu in the menu bar.
- Use the keys on the keyboard to navigate through records. For the next record, use the down arrow; for the previous record, use the up arrow.

Dialog and Alert Boxes

Pop-up boxes:

Pop-up boxes are windows that appear on your screen for a specific purpose. All pop-up boxes require that you take action before continuing on the form.

Types of pop-up boxes:

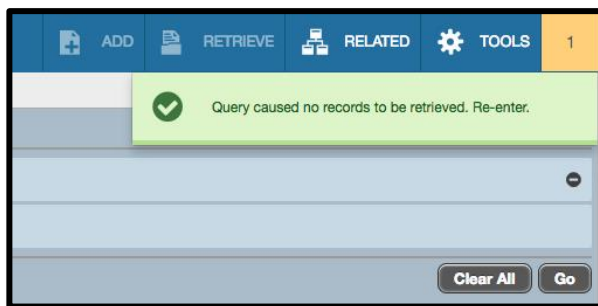
There are two types of pop-up boxes within Banner.

- Dialog Box
- Alert Box

Dialog box

A dialog box will appear when you choose from two or more responses.

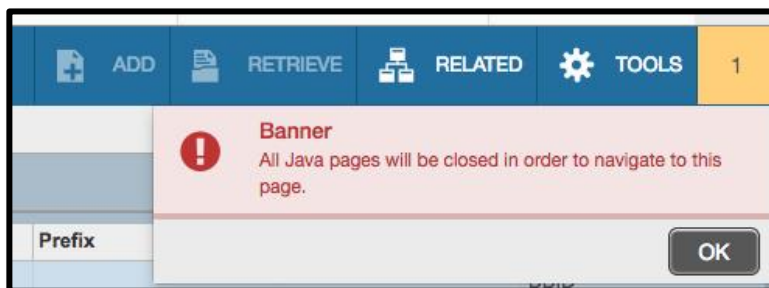
The following is an example of a dialog box.



Alert box

An alert box notifies you of a condition that may impact data.

The following is an example of an alert box.



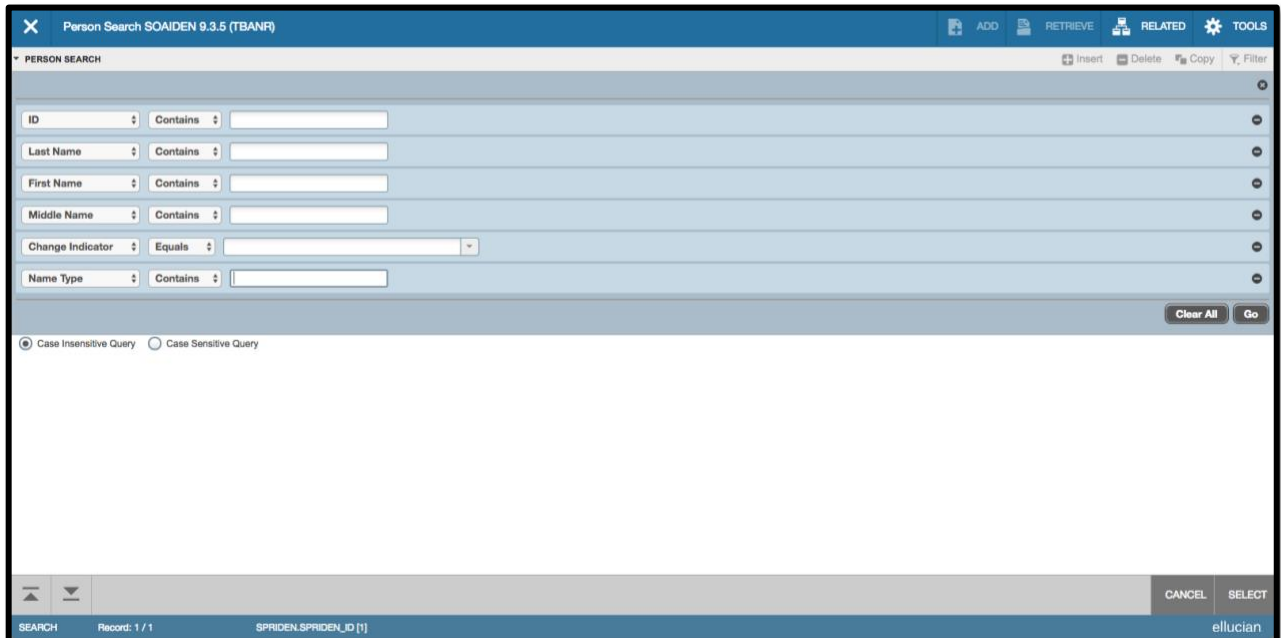
Types of Forms

Two types of forms are available to most Banner users daily: Query and Application.

Query

Query forms are used to look up existing information, often returning information to the calling form. You can access most query forms directly from the main menu with Direct Access or Object Search.

Examples of Query Forms: SOAIDEN, GUIMAIL



The screenshot displays the 'Person Search SOAIDEN 9.3.5 (TBANF)' interface. At the top, a blue header bar contains the title and navigation icons for ADD, RETRIEVE, RELATED, and TOOLS. Below the header, a search criteria section allows users to filter by ID, Last Name, First Name, Middle Name, Change Indicator, and Name Type, each with a dropdown menu for the search operator (e.g., 'Contains'). A 'Clear All' button and a 'Go' button are positioned to the right of the search criteria. Below the search criteria, there are two radio buttons for 'Case Insensitive Query' (selected) and 'Case Sensitive Query'. The main area of the form is a large, empty white space. At the bottom, a status bar shows 'SEARCH', 'Record: 1 / 1', and the field 'SPRIDEN.SPRIDEN_ID [1]'. On the right side of the status bar, there are 'CANCEL' and 'SELECT' buttons, and the 'ellucian' logo.

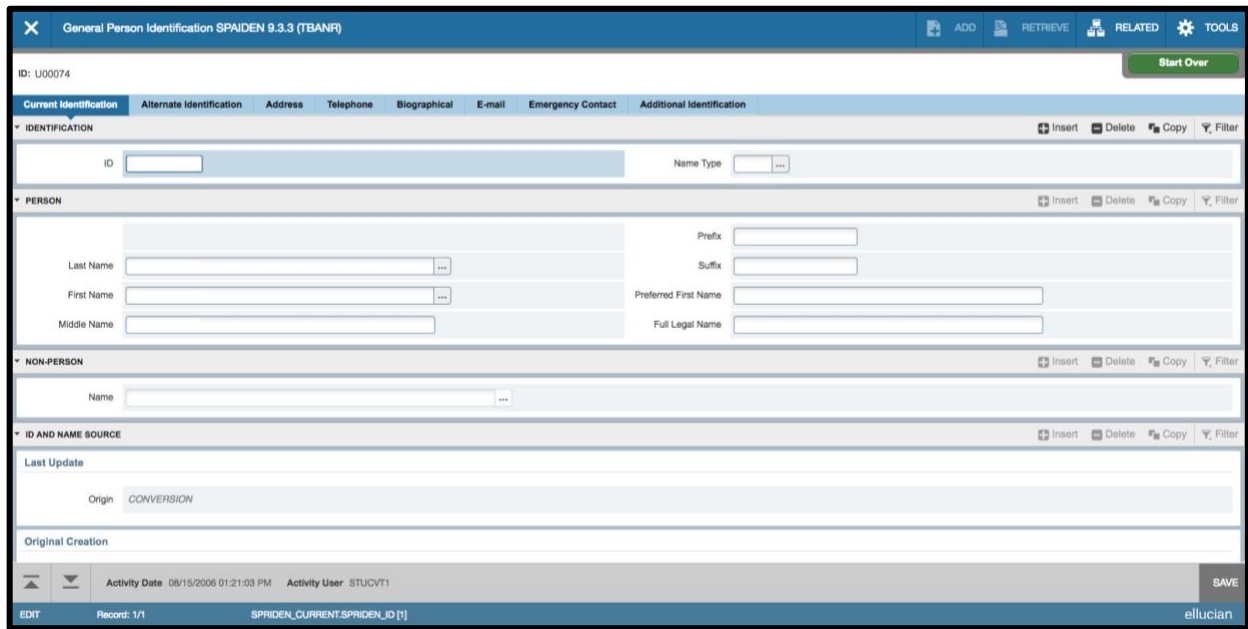
Application forms

Application forms are used to enter Banner, update, and query information.

Application forms:

- Are the most common type of form.
- Provide data entry capabilities - enabling you to build information into the system.
- Provide query capabilities - allowing you to request and view existing information in the database.

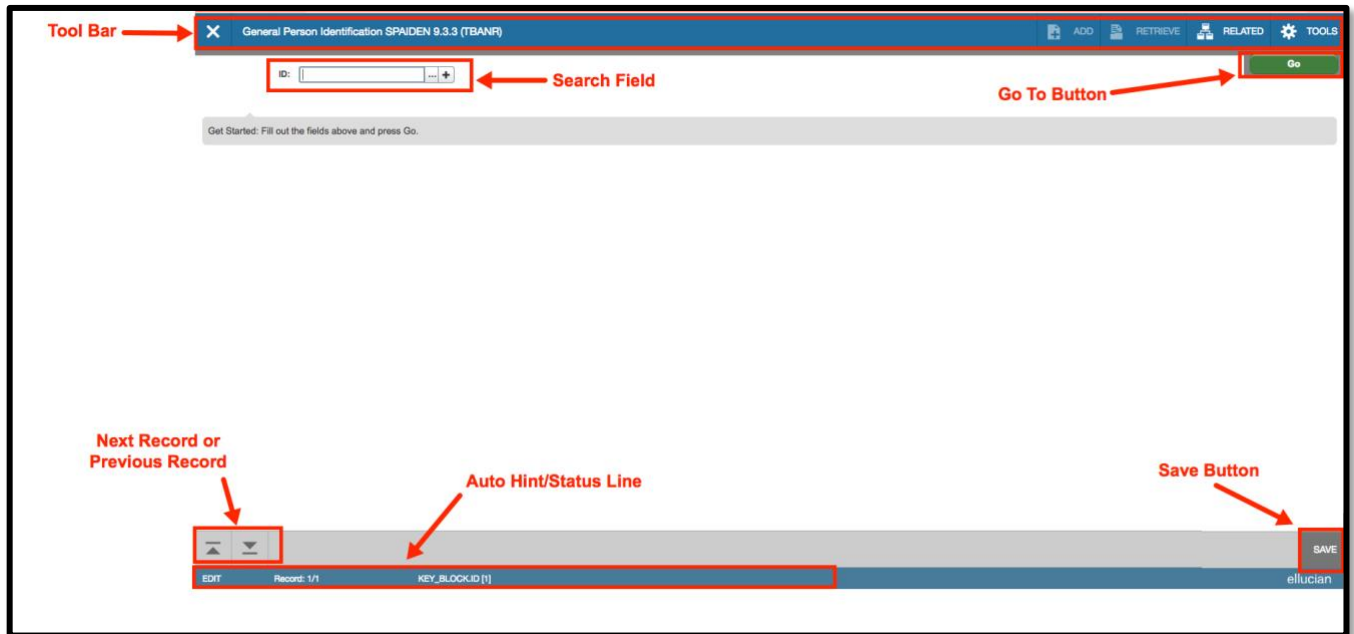
Examples of Application Forms: Any of the xPAIDEN forms (PPAIDEN, SPAIDEN, APAIDEN)



The screenshot displays the 'General Person Identification SPAIDEN 9.3.3 (TBANR)' application form. The interface includes a top navigation bar with tabs for 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', 'Emergency Contact', and 'Additional Identification'. The 'Current Identification' tab is active. The form is divided into several sections: '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, and Original Creation). The 'Origin' field is set to 'CONVERSION'. At the bottom, there is a status bar showing 'Activity Date: 06/15/2006 01:21:03 PM', 'Activity User: STUCVT1', and a 'SAVE' button. The footer indicates 'EDIT Record: 1/1 SPIDEN_CURRENT:SPIDEN_ID [1]' and the user 'ellucian'.

Chapter 3: General Menu and Navigation

The Main Menu provides an overview of Banner's menus, forms, and jobs. The Main Menu is used to navigate through Banner. In this section, we will review the components of the Banner Main Menu.



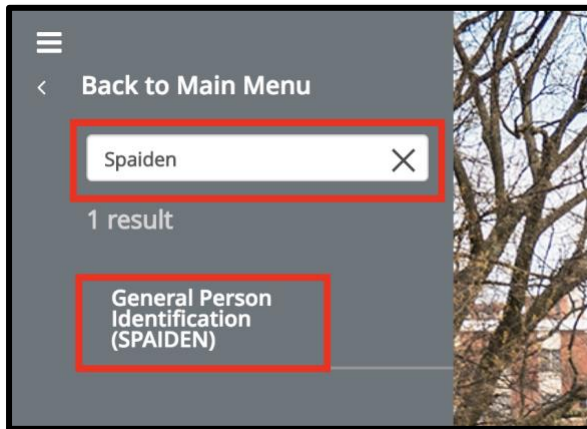
Menu Bar

The Banner menu bar, located at the top of every form, contains pull-down menus and offers various options for navigating within Banner. It is accessible anytime except when a dialog box, alert box, or list of values (LOV) is displayed on the screen.

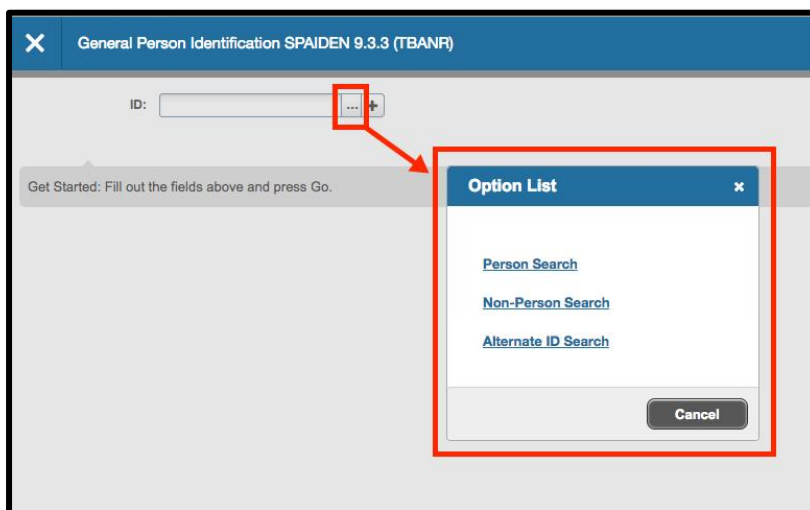
Chapter 4: Accessing and Filtering Data

You can filter data in a section if an active Filter icon is in the section header. To do so, follow the following steps.

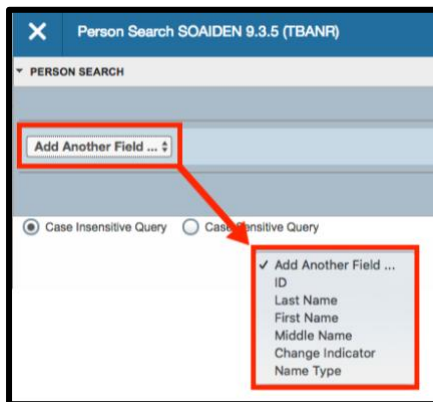
1. Begin the search by searching for the SPAIDEN form from the home page.



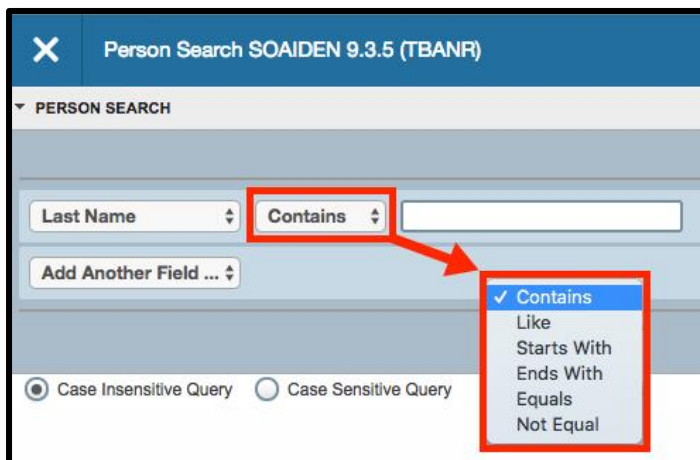
2. Select the lookup icon (...). From here, there are three available searches: A) Person Search, B) Non-Person Search, and C) Alternate ID Search. Choose the type of search to be completed from the option list.



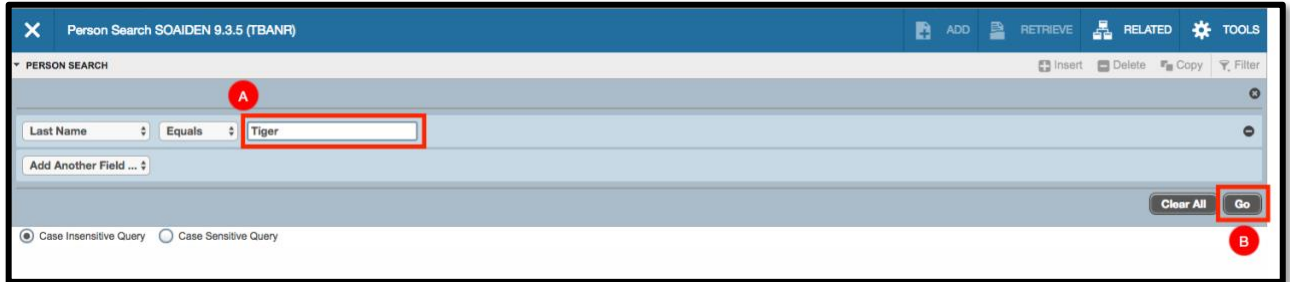
3. Choose the field you want to filter from the **Add Another Field** drop-down list. Begin the filter process by selecting the appropriate filter (e.g., ID, Last Name, etc.).



4. 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.*



5. A) Enter a value for the field you selected. Select **Add Another Field** from the drop-down menu and add any additional filters. If any additional information is known, then B) click **Go**.



Person Search SOAIDEN 9.3.5 (TBANR)

PERSON SEARCH

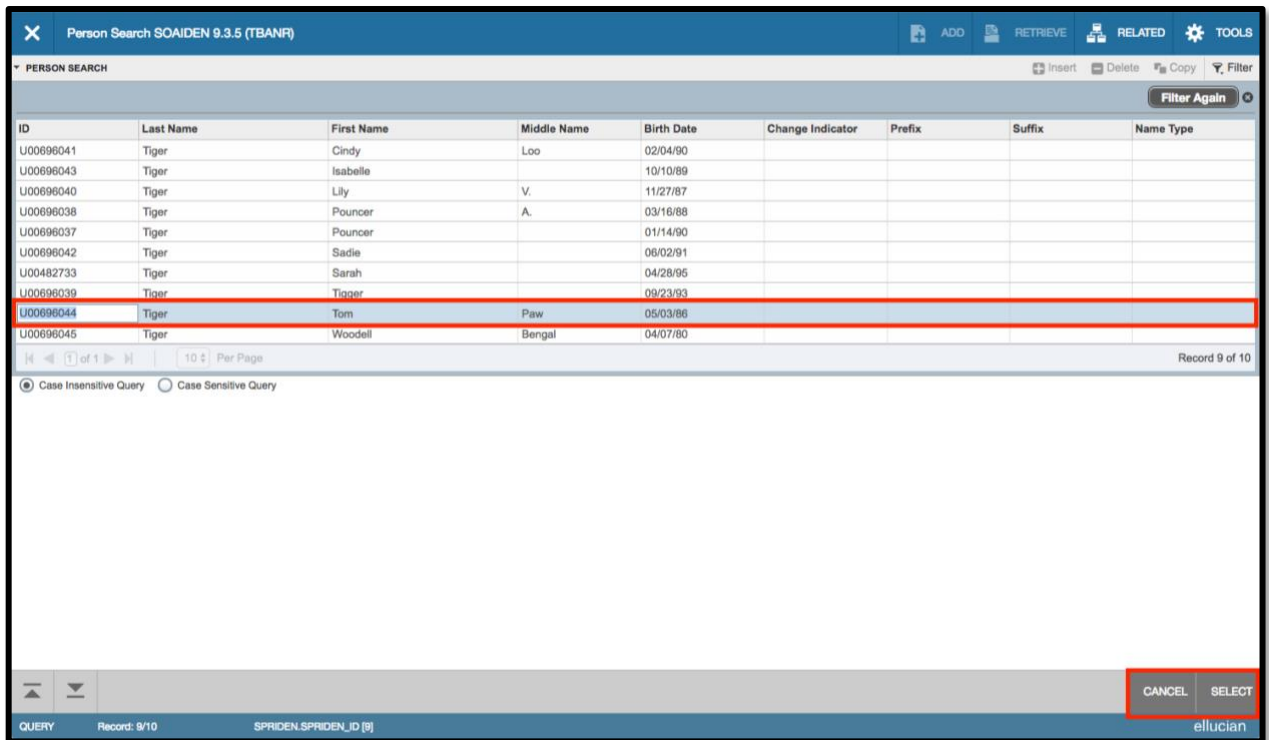
Last Name: Tiger

Add Another Field ...

Case Insensitive Query Case Sensitive Query

Clear All Go

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



Person Search SOAIDEN 9.3.5 (TBANR)

PERSON SEARCH

Filter Again

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
U00696041	Tiger	Cindy	Loo	02/04/90				
U00696043	Tiger	Isabelle		10/10/89				
U00696040	Tiger	Lily	V.	11/27/87				
U00696038	Tiger	Pouncer	A.	03/16/88				
U00696037	Tiger	Pouncer		01/14/90				
U00696042	Tiger	Sadie		06/02/91				
U00482733	Tiger	Sarah		04/26/95				
U00696039	Tiger	Tiger		09/23/93				
U00696044	Tiger	Tom	Paw	05/03/86				
U00696045	Tiger	Woodell	Bengal	04/07/80				

Record 9 of 10

Case Insensitive Query Case Sensitive Query

CANCEL SELECT

QUERY Record: 9/10 SPRIDEN,SPRIDEN_ID [9] ellucian

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



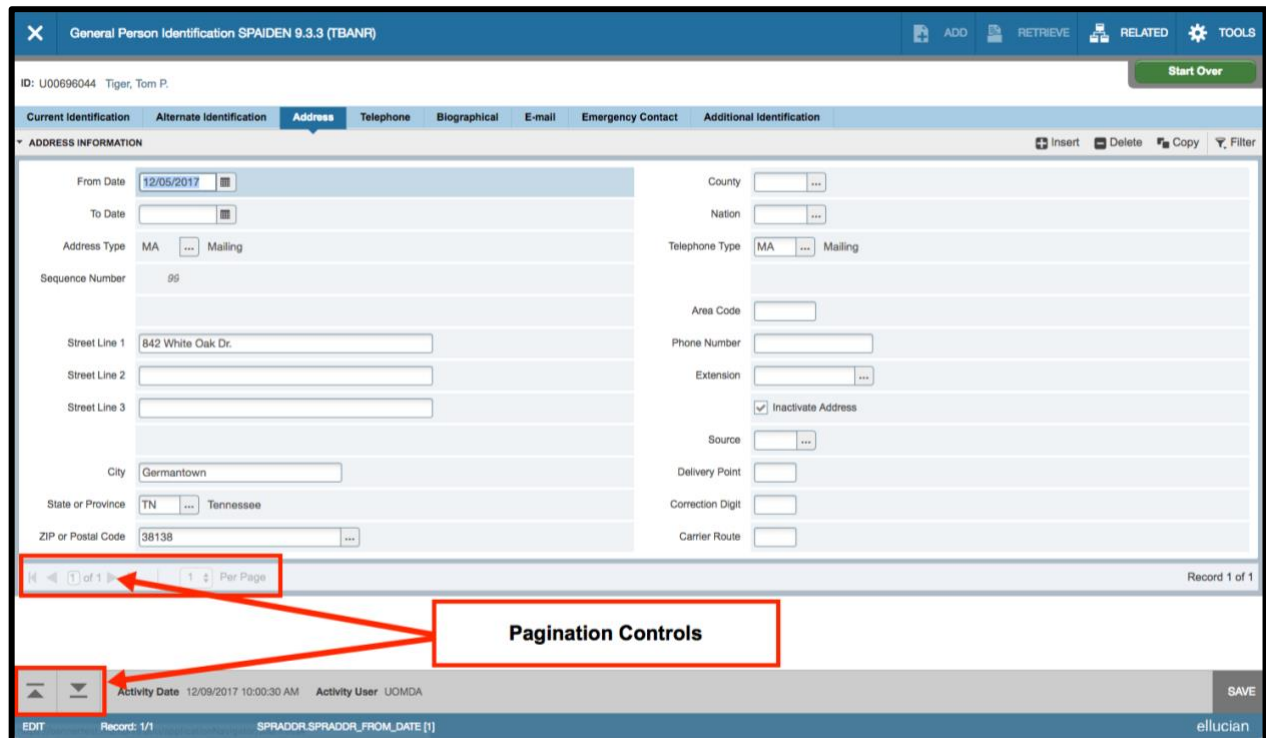
Multiple Records

Data, such as addresses, can exist in multiple records of the same type in the database and are displayed in various ways. Records can be viewed one record at a time or in a grid.

One record at a time

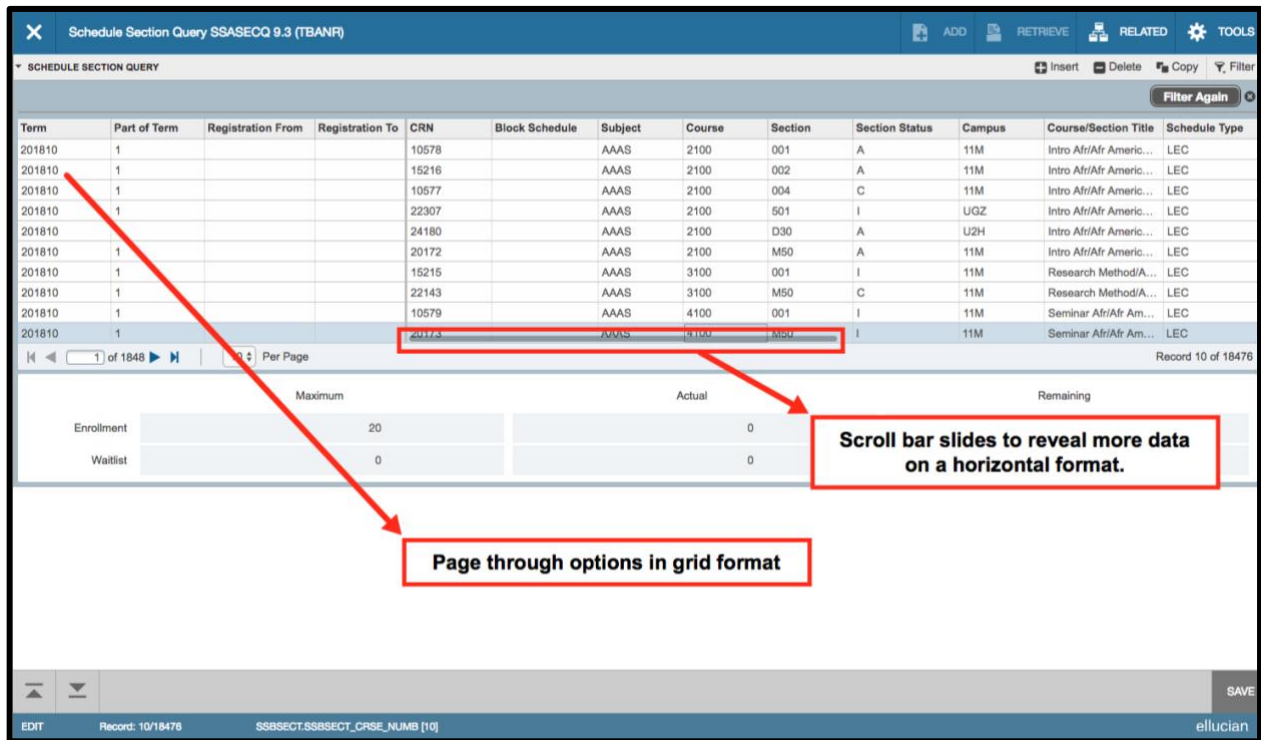
In this instance, the details of the data are not displayed in a table grid but rather in a more easily readable manner. You can move from record to record using pagination controls

Note: The pagination controls are the arrows located in the bottom left-hand corner



In a grid

The data is presented in column and row format in the instance below. You may need to scroll to view all the data. You can review the records using the pagination controls, decide how many records you want to review in the grid and sort the data in ascending or descending order by clicking the arrows next to the column heading.



Schedule Section Query SSASECQ 9.3 (TBANR)

ADD RETRIEVE RELATED TOOLS

SCHEDULE SECTION QUERY Insert Delete Copy Filter

Filter Again

Term	Part of Term	Registration From	Registration To	CRN	Block Schedule	Subject	Course	Section	Section Status	Campus	Course/Section Title	Schedule Type
201810	1			10578		AAAS	2100	001	A	11M	Intro Afr/Afr Americ...	LEC
201810	1			15216		AAAS	2100	002	A	11M	Intro Afr/Afr Americ...	LEC
201810	1			10577		AAAS	2100	004	C	11M	Intro Afr/Afr Americ...	LEC
201810	1			22307		AAAS	2100	501	I	UGZ	Intro Afr/Afr Americ...	LEC
201810	1			24180		AAAS	2100	D30	A	U2H	Intro Afr/Afr Americ...	LEC
201810	1			20172		AAAS	2100	M50	A	11M	Intro Afr/Afr Americ...	LEC
201810	1			15215		AAAS	3100	001	I	11M	Research Method/A...	LEC
201810	1			22143		AAAS	3100	M50	C	11M	Research Method/A...	LEC
201810	1			10579		AAAS	4100	001	I	11M	Seminar Afr/Afr Am...	LEC
201810	1			20173		AAAS	4100	002	I	11M	Seminar Afr/Afr Am...	LEC

1 of 1848 Per Page Record 10 of 18478

	Maximum	Actual	Remaining
Enrollment	20	0	
Waitlist	0	0	

Page through options in grid format

Scroll bar slides to reveal more data on a horizontal format.

SAVE ellucian

Advanced Features

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 the field is required, type of data (character or numeric), maximum length, and other field characteristics. The specific properties that are displayed depend on the kind of field. Place the cursor in the field and select Tools > Item Properties to display Item Properties for a field.

Action	Banner 9 Keystroke	Banner 8 Keystroke
Cancel Page, Close Current Page, or Cancel Search/Query	Ctrl + Q	Ctrl + Q
Change MEP Context	Alt + Shift + C	
Choose/Submit	Enter	Enter
Clear All in Section	Shift + F5	Shift + F5
Clear One Record	Shift + F4	Shift + F4
Clear Page or Start Over	F5	Shift + F7
Count Query	Shift + F2	Shift + F2
Delete Record	Shift + F6	Shift + F6
Down/ Next Record	Down Arrow	Down Arrow
Duplicate Item	F3	F3
Duplicate Selected Record	F4	F4
Edit	Ctrl + E	Ctrl + E
Execute Filter Query	F8	F8
Exit	Ctrl + Q	Ctrl + Q
Expand/ Collapse Drop Down Field	Alt + Down Arrow	Click Field
Export	Shift + F1	Extract Data with Key or Extract Data no Key
First Page	Ctrl + Home	
Insert/ Create Record	F6	F6
Last Page	Ctrl + End	
List of Values	F9	F9
More Information	Ctrl + Shift + U	Alt + H
Next Field or Item	Tab	Tab
Next Page Down	Page Down	Page Down
Next Section	Alt + Page Down	Ctrl + Page Down
Open Menu Directly	Ctrl + M	F5
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	
Previous Field or Item	Shift + Tab	Shift + Tab
Previous Page Up	Page Up	Page Up
Previous Section	Alt + Page Up	Ctrl + Page Up
Print	Ctrl + P	Shift + F8
Refresh or Rollback	F5	Shift + F7
Save	F10	F10
Search or Open Filter Query	F7	F7
Select on a Called Page	Alt + S	Shift + F3
Toggle Multi/ Single Records View	Ctrl + G	
Up/Previous Record	Up Arrow	Up Arrow

Action	Banner 9 Keystroke	Banner 8 Keystroke
Workflow		
Release Workflow	Alt + Q	Icon or Menu
Submit Workflow	Alt + W	Icon or Menu

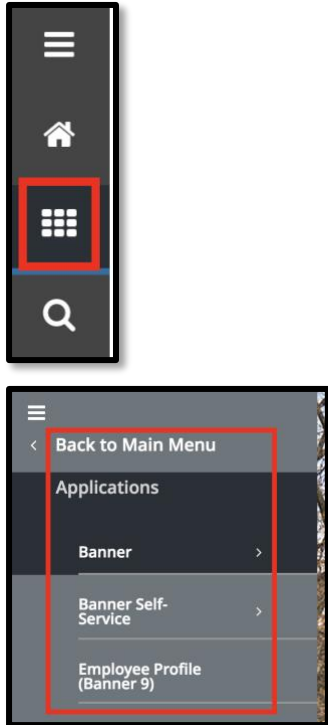
Action	Banner 9 Keystroke	Banner 8 Keystroke
Banner Document Management		
Add BDM Documents	Alt + A	Icon or Menu
Retrieve BDM Documents	Alt + R	Icon or Menu

Application Navigator	
App Nav - Access Help	Ctrl + M
App Nav - Access Menu	Ctrl + Y
App Nav - Display Recently Opened Items	Ctrl + Shift + L
App Nav - Search	Ctrl + Shift + Y
App Nav - Sign Out	Ctrl + Shift + F
App Nav - Access Help	Ctrl + M
App Nav - Access Menu	Ctrl + Y

Chapter 5: My Banner and My Links

My Banner

My Banner appears at the top of the Main Menu and allows quick access to forms and other objects within Banner that are the most important in your daily work.



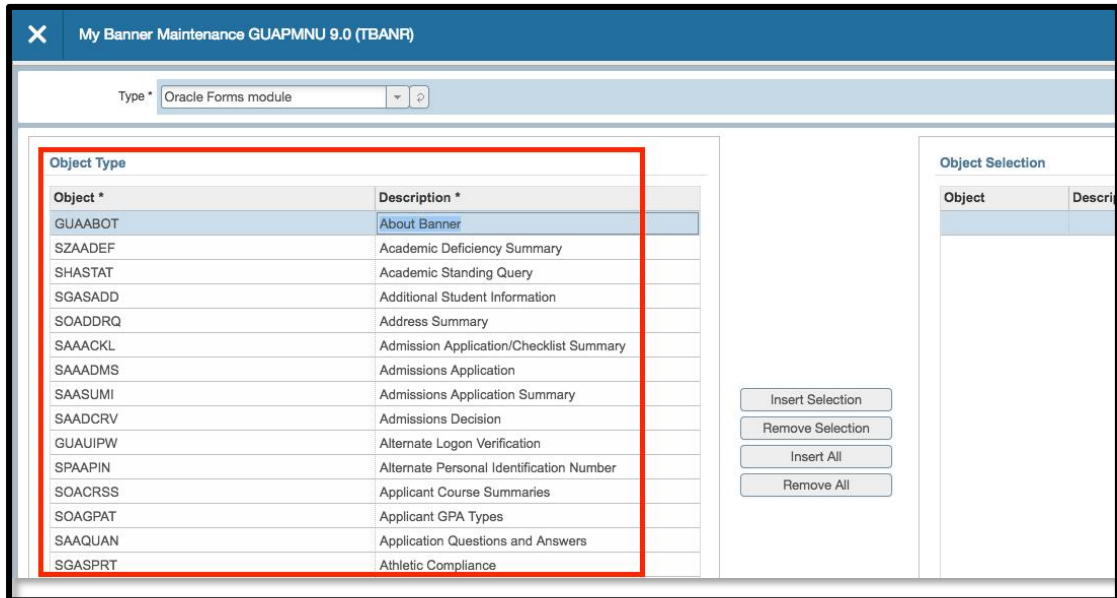
Creating your My Banner

1. From the Main Menu, (A) Search for GUAPMNU in either of the search fields. In this example, the one located to the top left is used instead of the one in the center of the screen. (B) Double-click on **My Banner Maintenance (GUAPMNU)** to expand the folder, then select the Object Type to build.



The My Banner Maintenance form will appear to the left of the screen.

2. In the *Maintenance* form, you can either scroll down the list on the left to locate Banner objects or perform a query search if you know the form or object name (see step 4 for querying).



Object *	Description *
GUAABOT	About Banner
SZAADEF	Academic Deficiency Summary
SHASTAT	Academic Standing Query
SGASADD	Additional Student Information
SOADDRQ	Address Summary
SAAACKL	Admission Application/Checklist Summary
SAAADMS	Admissions Application
SAASUMI	Admissions Application Summary
SAADCRV	Admissions Decision
GUAUIPW	Alternate Logon Verification
SPAAPIN	Alternate Personal Identification Number
SOACRSS	Applicant Course Summaries
SOAGPAT	Applicant GPA Types
SAAQUAN	Application Questions and Answers
SGASPRT	Athletic Compliance

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

Insert Selection
 Remove Selection
 Insert All
 Remove All

3. If scrolling through the list, when you have located the object, double-click it (it will become highlighted, and the text will be blue).

Select the **Insert Selection** button to move the selected forms to your *My Banner* forms list (the list on the right side).

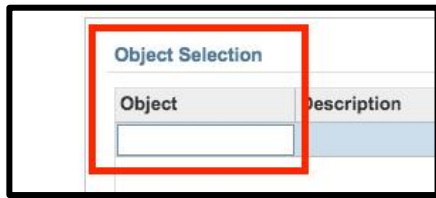


Insert Selection
 Remove Selection
 Insert All
 Remove All

4. To query, first ensure your cursor is positioned in the list on the right.

In the *Object* field, enter the 7-character form or object name. Click **Enter**. The Description will fill in. Nothing will happen if the name is incorrect; the object name and description will remain blank.

Note: Wild cards cannot be used to search in this field.



5. Click the Save button (in the upper left corner of the toolbar) to save your selections and exit Banner completely.

My Banner will update once you log out and back into the system.

Editing your My Banner

1. To make changes to your *My Banner* menu, go to the Main Menu and double-click on the **Organize My Banner [GUAPMNU]** form under *My Banner*.
2. To remove forms from your *My Banner* forms list, double-click on the form(s) you want to remove to highlight them. Next, click the **Remove Selection** button to remove them from your list.



Click the **Save** button (bottom right corner of the toolbar) to save your selections and exit Banner completely.

Note: My Banner will update once you exit Banner entirely and log back in.

Appendix

Naming Conventions

Position 1 of 7-character form name

Code	Product/Purpose
A	<u>Advancement</u>
B	<u>Property Tax</u>
C	<u>Courts</u>
D	<u>Cash Drawer</u>
F	<u>Finance</u>
G	<u>General</u>
K	<u>Work Management</u>
L	<u>Occupational Tax and License</u>
N	<u>Position Control</u>
O	<u>Customer Contact</u>
P	<u>Payroll</u>
Q	<u>Electronic Work Queue</u>
R	<u>Financial Aid</u>
S	<u>Student (shared)</u>
T	<u>Accounts Receivable</u>
U	<u>Utilities</u>
V	<u>Voice Response</u>
X	<u>Records Indexing</u>
W, Y, Z	<u>Reserved for Client Applications</u>

Position 2 of 7-character form name

Code	Product/Purpose
Advancement	
A	<u>Membership</u>
D	<u>Designation</u>
E	<u>Event Management</u>
F	<u>Campaign</u>
G	<u>Pledge and Gift/Pledge Payment</u>

Code Product/Purpose

Advancement

L	<u>Label</u>
M	<u>Prospect Management</u>
O	<u>Organization</u>
P	<u>Constituent/Person</u>
S	<u>Solicitor Organization</u>
T	<u>Validation form/table</u>
U	<u>Utility</u>
V	<u>Reserved - Canadian Solution Center</u>
X	<u>Expected Matching Gift</u>

Financial Aid

B	<u>Budgeting</u>
C	<u>Record Creation</u>
E	<u>Electronic Data Exchange</u>
F	<u>Funds Management</u>
H	<u>History and Transcripts</u>
J	<u>Student Employment</u>
L	<u>Logging</u>
N	<u>Need Analysis</u>
O	<u>Common Functions</u>
P	<u>Packing and Disbursements</u>
R	<u>Requirements Tracking</u>
S	<u>Student System Shared Data</u>
T	<u>Validation form/table</u>
U	<u>Utility</u>
V	<u>Reserved - Canadian Solution Center</u>

HR/Payroll (P) AND Position Control (N)

A	<u>Application</u>
B	<u>Budget</u>
C	<u>COBRA</u>
D	<u>Benefit/Deductions</u>
E	<u>Employee</u>
H	<u>Time Reporting/History</u>
O	<u>Overall</u>
P	<u>General Person</u>
R	<u>Electronic Approvals</u>

Code Product/Purpose

HR/Payroll (P) AND Position Control (N)

<u>S</u>	<u>Security</u>
<u>T</u>	<u>Validation/rule table</u>
<u>U</u>	<u>Utility</u>
<u>V</u>	<u>Reserved - Canadian Solution Center</u>
<u>X</u>	<u>Tax Administration</u>

Finance (F)

<u>A</u>	<u>Accounts Payable</u>
<u>B</u>	<u>Budget Development</u>
<u>C</u>	<u>Cost Accounting</u>
<u>E</u>	<u>Electronic Data Interchange</u>
<u>F</u>	<u>Fixed Assets</u>
<u>G</u>	<u>General Ledger</u>
<u>I</u>	<u>Investment Management</u>
<u>N</u>	<u>Endowment Management</u>
<u>O</u>	<u>Operations</u>
<u>P</u>	<u>Purchasing/Procurement</u>
<u>R</u>	<u>Research Accounting</u>
<u>S</u>	<u>Stores Inventory</u>
<u>T</u>	<u>Validation form/table</u>
<u>U</u>	<u>Utility</u>
<u>V</u>	<u>Reserved - Canadian Solution Center</u>
<u>X</u>	<u>Archive/Purge</u>

General (G)

<u>E</u>	<u>Event Management</u>
<u>J</u>	<u>Job Submission</u>
<u>L</u>	<u>Letter Generation</u>
<u>O</u>	<u>Overall</u>
<u>P</u>	<u>Purge</u>
<u>S</u>	<u>Security</u>
<u>T</u>	<u>Validation form/table</u>
<u>U</u>	<u>Utility</u>
<u>V</u>	<u>Reserved - Canadian Solution Center</u>
<u>X</u>	<u>Cross Product</u>

Code Product/Purpose Student (S)

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

Accounts Receivable (T)

<u>F</u>	<u>Finance Accounts Receivable</u>
<u>G</u>	<u>General Accounts Receivable</u>
<u>O</u>	<u>Overall</u>
<u>R</u>	<u>Research Accounting</u>
<u>S</u>	<u>Student Accounts Receivable</u>
<u>T</u>	<u>Validation form/table</u>
<u>U</u>	<u>Utility</u>
<u>V</u>	<u>Reserved - Canadian Solution Center</u>

Position 3 of 7-character form name

Code	Product/Purpose
A	<u>Application</u>
B	<u>Base Table</u>
I	<u>Inquiry</u>
P	<u>Process</u>
R	<u>Rule Table, Repeating Table, Report, or Process</u>
V	<u>Validation</u>
M	<u>Maintenance</u>

Buttons

Banner admin pages include several buttons.

Button: Description

Add and Retrieve: Use the Add and Retrieve buttons to interact with Banner Document Management (xTender) to store and review documents properly.

Go: Use the Go button to advance to the body of the page after populating the key block.

Save: To save changes on the page, click the Save button located on the bottom right side of the page.

Section Navigation: 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 at each page's bottom left.

Select and Cancel: 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, Select and Cancel are presented at the bottom of the page.

Banner Keyboard Shortcuts

These are some of the most commonly used functions, not a comprehensive list.

Banner Function	Keyboard key
------------------------	---------------------

<u>Cancel Query</u>	<u>Ctrl+Q</u>
<u>Clear or Delete Record</u>	<u>Shift+F6</u>
<u>Enter Query</u>	<u>F7</u>
<u>Execute Query</u>	<u>F8</u>
<u>Exit option</u>	<u>Ctrl+Q</u>
<u>Insert Record</u>	<u>F6</u>
<u>Next Block</u>	<u>Ctrl+Page Down</u>
<u>Next Field</u>	<u>Tab</u>
<u>Next Record</u>	<u>Down Arrow</u>
<u>Previous Block</u>	<u>Ctrl+Page Up</u>
<u>Previous Field</u>	<u>Shift+Tab</u>
<u>Previous Record</u>	<u>Up Arrow</u>
<u>Rollback</u>	<u>Shift+F7</u>
<u>Save option</u>	<u>F10</u>
<u>Select option</u>	<u>Shift+F3</u>

Locating Help Resources

umTech offers support to faculty, staff, and students, provides additional assistance, and resources. Such help can be located as follows:

Submitting a Service Request

Login URL: [Click here for our service desk ticketing system.](#) After logging in, choose the appropriate form request for services.

Contact the ITS Service Desk — 901.678.8888 any day of the week! *(Excluding Some Holidays)*

[ITS Service Desk Hours](#)

Contact the Service Desk for assistance with technical login problems or issues. ALL incoming calls after hours will be handled by voicemail services. If you require assistance after 8:00 pm, please leave a message or [submit a service request](#).

Voice messages will be checked regularly and receive priority response the following business day. You may also email umTech at umtech@memphis.edu. *(Using this email will automatically generate a service request).*

Important Links

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