Banner 9 Forms – Quick Reference Guide

Banner 9 Financial Aid BAND Access uses single sign on and will require your username & password: 
https://banner9-test.bridgew.edu/applicationNavigator/

I. Navigation Improvements: Application Navigator

1. **Menu**: Click the three lines at the top left to open the full Banner Menu on the left-hand side of the window which will provide text labels for the icons.

2. **Dashboard or Home Link**: Will get you back to the main welcome form.
3. **Applications**: Opens the familiar Banner 8 menu tree where you can select the module and form you would like to open.

It is also here that your ‘My Banner’ menu will display if you have utilized the GUAPMNU form to customize a list of forms for yourself:
4. **Search:** Click on this icon to open the Search window. You can then enter either the descriptive name of the form or the Banner acronym. The Search icon works the same as the Search bar on the Welcome form.

For example, searching for RRAAREQ through either is not case sensitive:

In both cases, you could also search for ex. “comments” if you were unsure of the acronym for RHACOMM:

**Please Note:** If the requested form has not been transformed, it will not open. You will need to open a Banner 8 session using IE (Internet Explorer).
5. **Recently Opened**: It is displayed with a count of forms you have visited. Open the list and select a form to access it.
6. **Help:** Click this link when you are accessing a specific form to open a new tab with the Ellucian Banner 9 help site. Here you will find detailed information about that module and forms within.
7. **Sign Out**: Use the *Sign Out* button to make sure you are logged out of the application.
8. **Keyboard Shortcuts**: Click this bottom right icon to access the available keyboard shortcuts on the main welcome form.
II. Improved Features within Forms – Form Header

1. **Form Close**: X
2. **Form Title**: In this example it is Applicant Requirements RRAAREQ 9.3.8
3. **Add and Retrieve**: Used with BDM
4. **Related Menu**: Displays a list of forms that can be accessed from this form.
5. **Tools**: Includes Refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the form.

III. Improved Features within Forms – Toolbar

At the right-hand side of the form, users will notice a toolbar which offers quick access to common functions.

**Insert**: Inserts a record
**Delete**: Deletes a record
**Copy**: Copies records
**Filter**: Click to show sorting options for the section of the form, or process you are viewing.

For example, when in RRAAREQ, you can filter the requirements shown with basic information or using an advanced combination of filters:
<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requirement</td>
<td>Equals</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>Equals</td>
<td></td>
</tr>
<tr>
<td>Status Date</td>
<td>Equals</td>
<td></td>
</tr>
<tr>
<td>Satisfied</td>
<td>Equals</td>
<td></td>
</tr>
<tr>
<td>Fund</td>
<td>Equals</td>
<td></td>
</tr>
<tr>
<td>Add Another Field</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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IV. System Messaging: Success, Warnings, & Errors

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

**Successful save of data—Green**
- Saved successfully (1 rows saved)

**Warning Messages—Yellow**
- New ID Created
  - Generated ID: R013000101. Identification record created. Biographical record not created. Address record create failed. Telephone record not created. E-mail record not created. Additional ID not created.

**Error Messages — Red**
- *ERROR* Pay Event Overlaps With Payroll Year. 2017 Pay Id: BW Pay Number: 2

**Informational Messages — Light Blue**
- Banner
  - No matches found, create as new?
    - Yes
    - No
V. Familiar Concepts

Tools such as Next Block, Rollback, and Save still exist but have been moved:

1. **Start Over** – Replaces the Rollback button. It will return you to the Key Block section of the form
2. **Next Section/Previous Sections** – arrows at bottom to go up and down replacing next/previous block
3. **Record counts** still appear at the bottom left
4. **Save** – moved from top left to bottom right
Look-up: 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 form.

Pagination Controls: Data can be viewed one record at a time or in a grid. When viewing one record at a time, you can form through the records using the pagination controls (first, last, next, previous, or specific form number). Ex: TSAAREV or TGACSPV utilize pagination controls.

For users who need field specific information such as the physical table name, instead of Dynamic Help you can click on Tools, Item Properties and scroll down:
VI. Sections on Forms

Users can now collapse and expand sections of forms using the section controls located next to the section title. **NOTE:** The collapsing and expanding of sections will return to base view upon exit of the form.

VII. Related Menu

**Related Menu:** displays a list of forms that can be accessed from this form.
VIII. Sorting

As with Microsoft Excel, you may sort columns by clicking on the column header. You can also drag and drop columns into new locations on the form. **NOTE:** The sorting, moving and filtering will return to base view upon exit of the form.
IX. Data Extract

This is a feature from Banner INB that carries over into Banner 9. Data extraction is available on some forms allowing users to pull data into an excel file. Once you have the data on form, click Export under TOOLS. You can either Open or SAVE (Please be sure to use a secure data storage) and your information will display in Microsoft Excel.

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[Data Extraction Example]

**Data Extract**

<table>
<thead>
<tr>
<th>ZIP or Postal Code</th>
<th>City</th>
<th>State or Province</th>
</tr>
</thead>
<tbody>
<tr>
<td>00401</td>
<td>Pleasantville</td>
<td>NY</td>
</tr>
<tr>
<td>00501</td>
<td>Hultville</td>
<td>NY</td>
</tr>
<tr>
<td>00501</td>
<td>I R S Service Center</td>
<td>NY</td>
</tr>
</tbody>
</table>

Once you have the data on form, click Export under TOOLS. You can either Open or SAVE (Please be sure to use a secure data storage) and your information will display in Microsoft Excel.