

Eastern Kentucky University

Banner 9 Navigation Guide



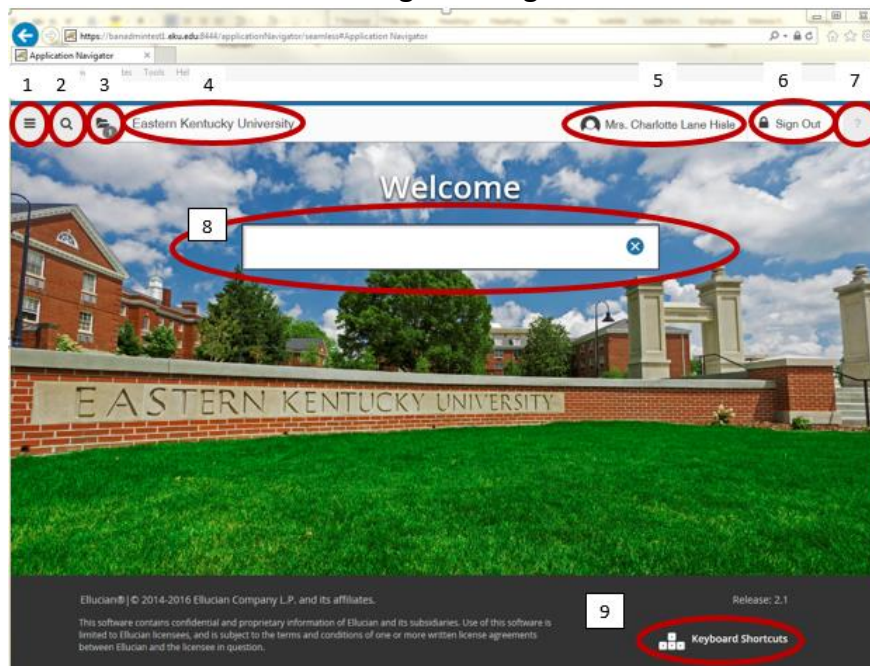
Stephanie King
Systems Specialist
Phone: (859)622-1079
Email: stephanie.king@eku.edu

Banner 9 landing page

There are 9 areas of the landing page that you may use in your navigation of Banner 9

1. **Menu Icon:** The Menu icon is located on the left corner of the Application Navigation Toolbar. Click on this icon to open the Banner Menu. Find the page you are interested in opening. Select the desired entry and click Enter.
2. **Search Icon:** The search Icon is located on the Application Navigation Toolbar, just to the right of the Menu icon. Click this icon to open the search window. You can then enter with the descriptive name of the page or the Banner acronym for the page.
3. **Recently Opened Icon:** The Recently Opened icon is located on the Application Navigation Toolbar, 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.
4. **Home Page:** Displays the name of the University and by selecting you will always be returned to the Application Navigator landing page.
5. **Banner User Name:** Displays the Banner Username of the person logged into this account.
6. **Sign Out button:** 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.
7. **Help Icon:** By selecting this icon help information will be displayed about the page you are currently viewing.
8. **Search Box:** 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.
9. **Key Board Shortcuts:** Application Navigator page has a set of keyboard shortcuts, which you can review by clicking on Keyboard Shortcuts in the bottom right corner of the page. – CTRL+M (Display the Menu), CTRL+Y (Display the open Items), CTRL+SHIFT+Y (Search), CTRL+SHIFT+L (Help) and CTRL+SHIFT+F (Sign Out)

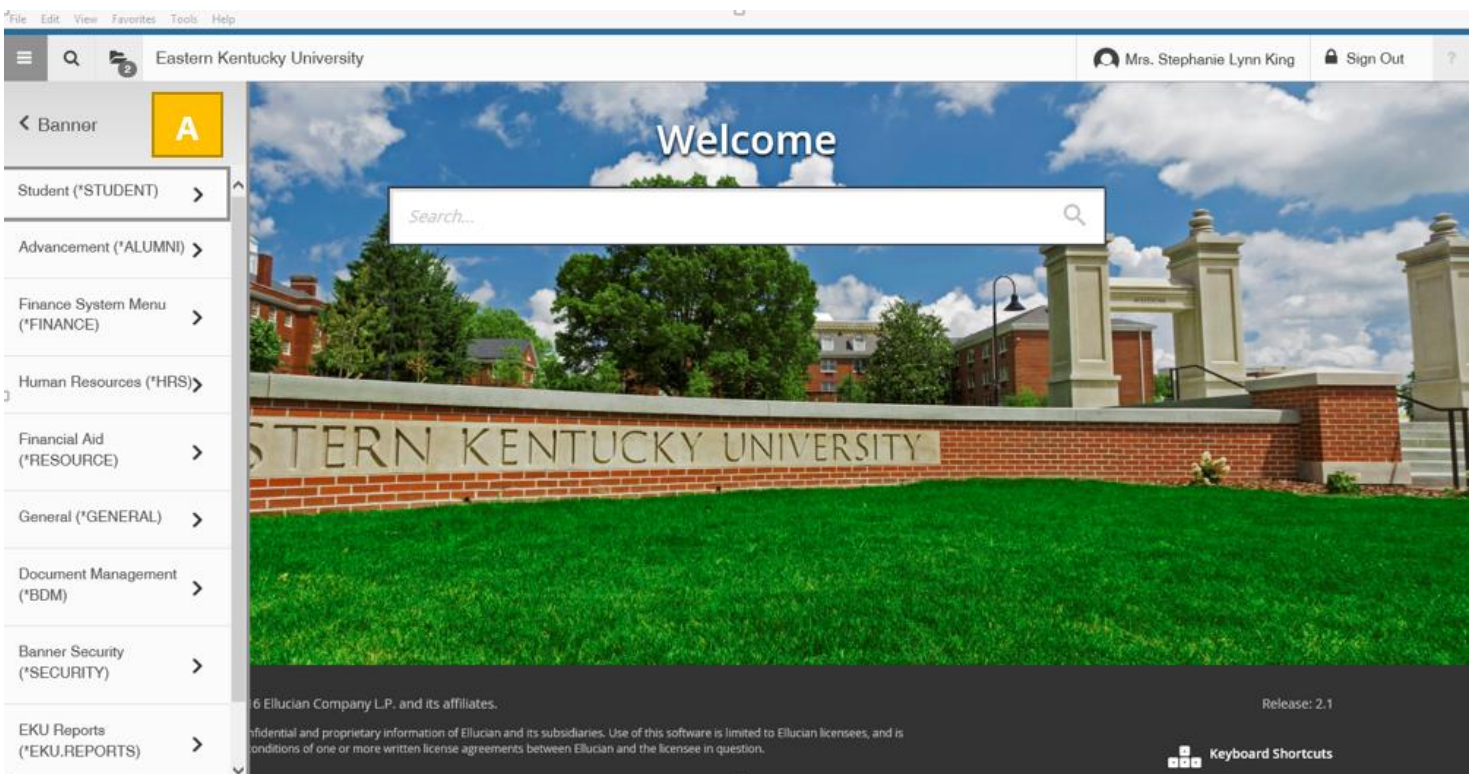
Navigation Page



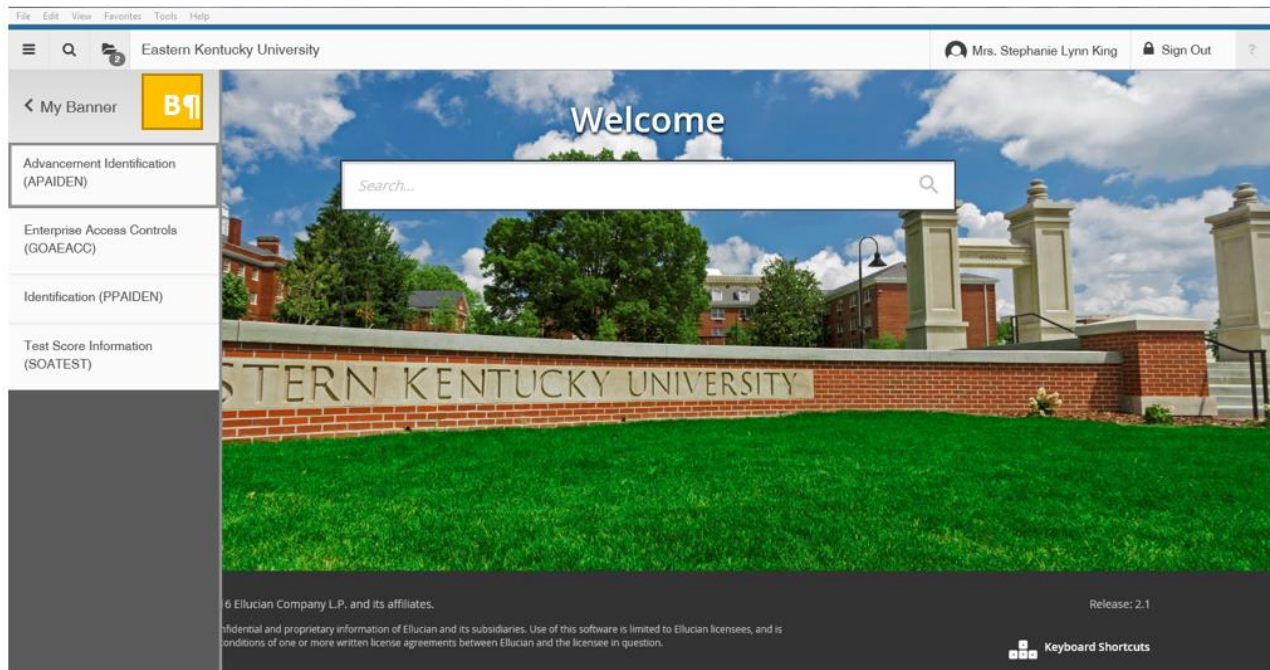
Menu Icon: Select the Menu icon and two options will be displayed: Banner which will display all of the modules in Banner and My Banner which is where you may create your personal list of pages and/or work flows.



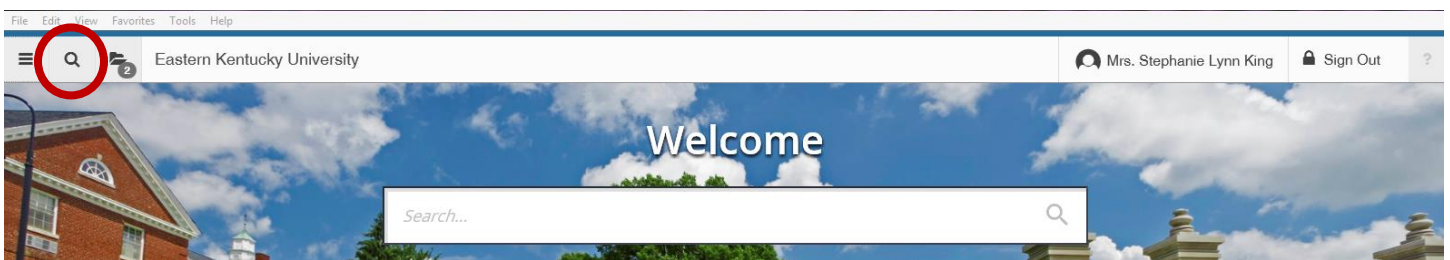
Banner Menu: Displays a list of all the Modules – select the button and continue selecting until you see the page you want. Then select the descriptive name or acronym.



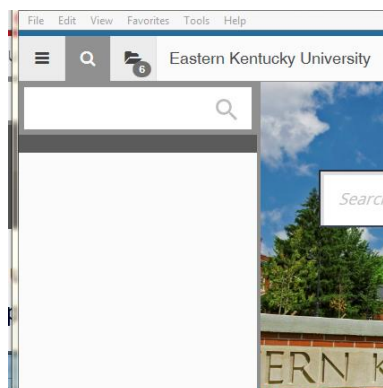
My Banner Menu: This will display a list of all of the pages that you added to your personal list for quick access. Pages that you use constantly and those that you use occasionally. This list may be updated at any time.



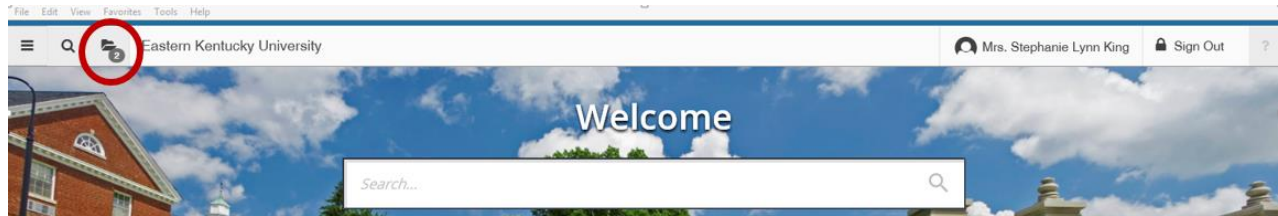
Search Icon: click on this icon to open the Search window. You may then enter the descriptive name of the page or the acronym for the page.



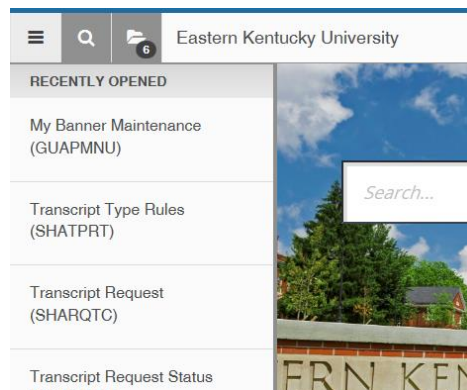
Start typing your search information, page acronym or description of page and a list of pages or subfolders will display in the left panel.



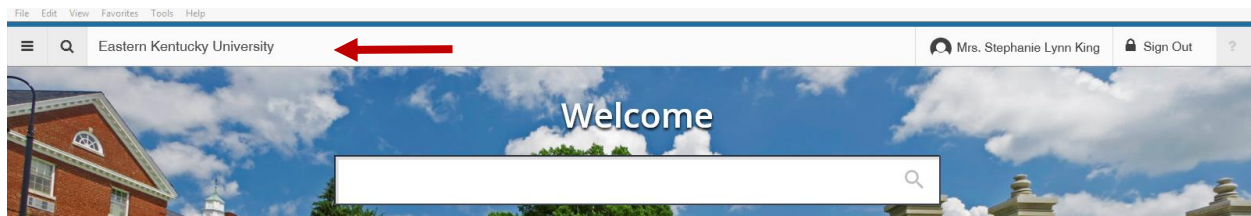
Open Folder icon: This icon will display once you have started accessing your pages in Banner. When selected it will list your recently opened pages for this Banner session.



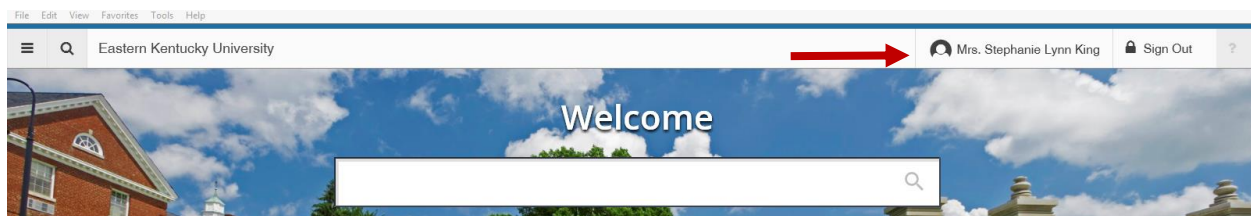
Select the folder icon and it will display the list of pages – select the page name and it will re-open the page



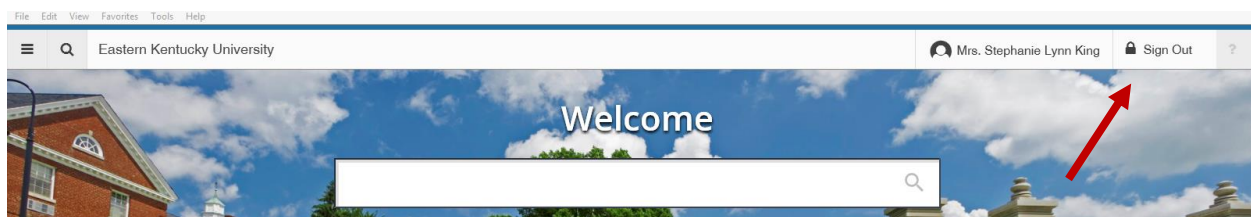
Home Page: When you select the University title link you will be returned to the Navigation Landing Page.



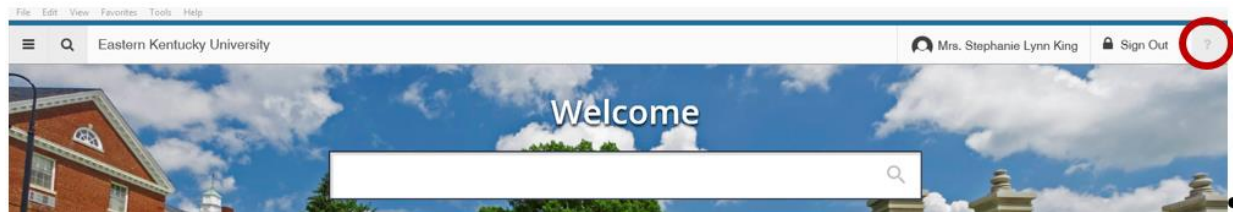
Account Name: Banner Username of the account owner will display when logged in.



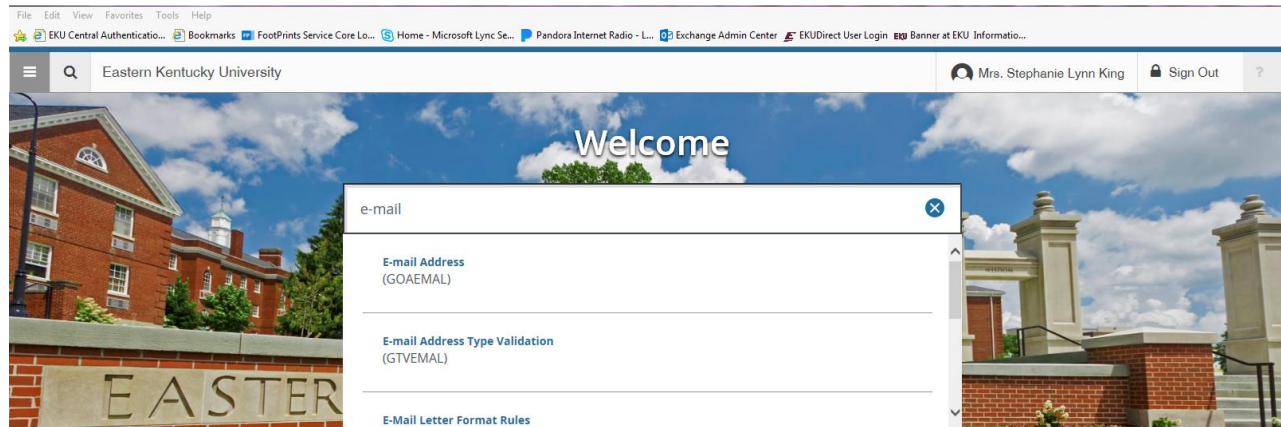
Sign Out Button: Always Sign Out of your Banner account by using the Sign Out button.



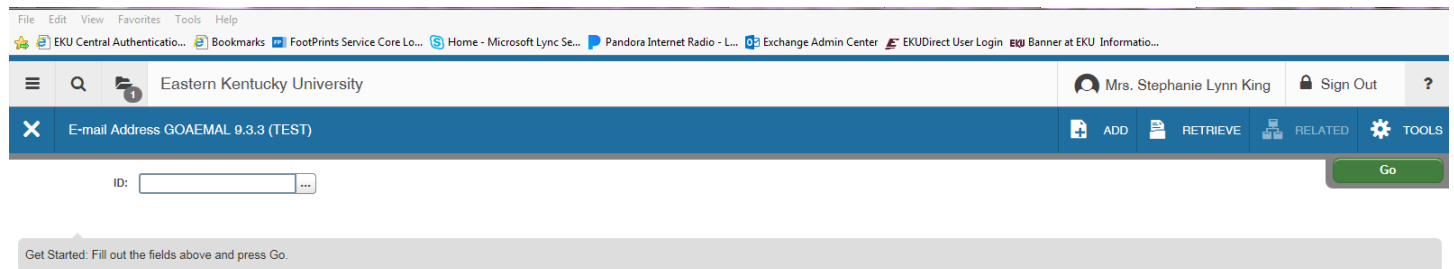
On-line Help Icon – On-line help is available via the “?” icon or the shortcut key (CTRL+L) use this function on any of the pages that you would like more information or help in using the page.



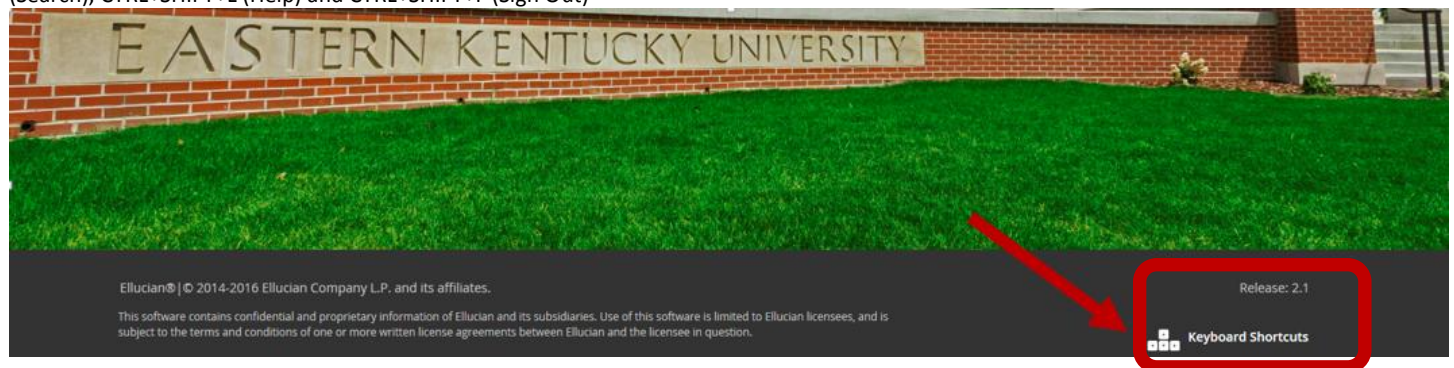
Search Box: In this box, you enter either the descriptive name of the page or the Banner acronym for the page. Find the desired page in the list and select by clicking or Enter key when using acronym.



Selected the page E-mail Address (GOAEMAL). This is the transformed page look.

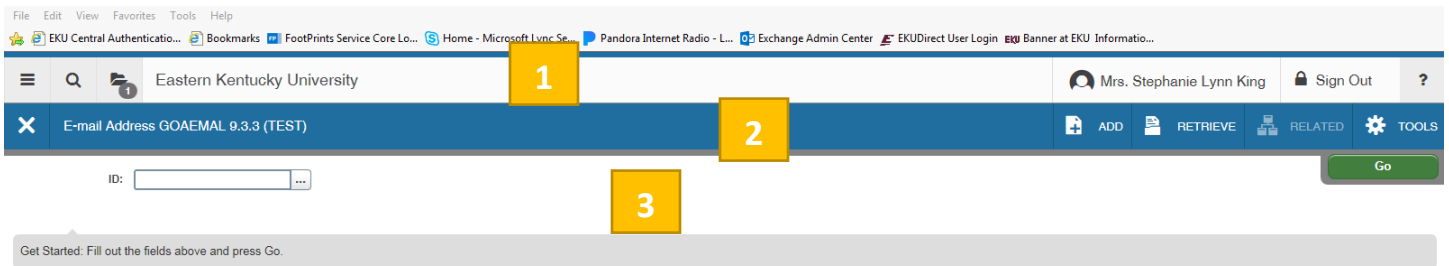


Keyboard shortcuts for Navigation page: Selecting any of the buttons will display the legend. Letting you know what function will be operated with the key combinations: CTRL+M (Display the Menu), CTRL+Y (Display the open Items), CTRL+SHIFT+Y (Search), CTRL+SHIFT+L (Help) and CTRL+SHIFT+F (Sign Out)



Banner 9 Basic Transformed Page Layout

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



4



1. **Basic Navigation header:** includes the Menu Icon, Search Icon, Recently Opened Icon, Home Page Link, Banner Username, Sign Out button and Online Help Icon.
2. **Page header** contains the following: Page close icon “X” always use this icon to close your page. Page title which includes: description, acronym, version and database. Release and Submit buttons, which are used only with workflows. Add and Retrieve icons which are used with Banner Document Management. Related Menu button, which displays a list of pages that may be accessed from this page. Tools Menu which will include refresh, export, print, clear record, item properties, display ID image and other options controlled by the page. Notification Center: will be located to the right of the Tools menu and display 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 may click in the box with the number in the page header to open or close the Notification Center.
3. **Key Block:** The first block on most pages and 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 are disabled. When the cursor is in the key block, the information is displayed in a column format. When you leave the key block by clicking the Go button, the data is rearranged into a linear format. To access the body of the page, populate the key block data and then click Go. You may return to the key block if you are in the body of a page by clicking Start Over.

4. **Sections:** Pages are divided into sections that contain additional details for the key information. A section may represent one record or multiple records depending on the type of information you are working with. 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 section may have a header that includes icons for the following actions:

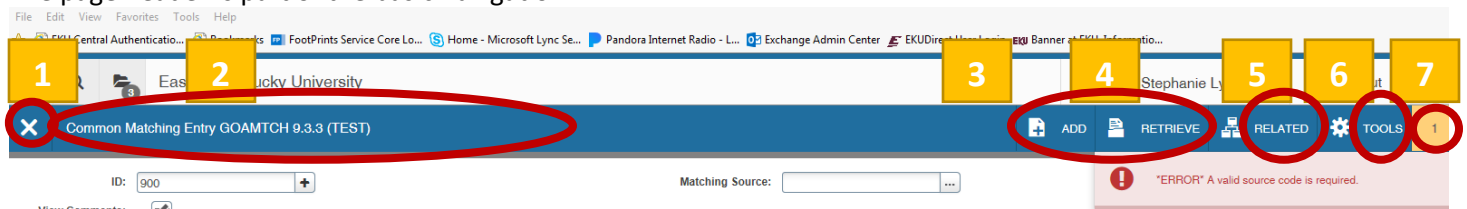
- **Insert** – use this to insert records in the section.
- **Delete** – Use this to delete records in the section.
- **Copy** – Use this to copy records in the section.
- **Filter** – Use this to filter records in the section.
- **More Information** – Use this if supplemental data can be entered for a section. The More Information icon is displayed with lines if supplemental data can be entered for the record. The icon is displayed with a check mark if supplemental data already exists for the record. If supplemental data may not be entered for a section, the icon is not displayed.

5. **Sections Navigation functions:** At the bottom of the section you may see some button icons and a display of information about the page. These buttons may be used for navigation to additional information, informing you about the data and actions you may take or must take for that page.

Another header will display additional information about section/page you are currently working with.

Page Header

The page header is part of the basic navigation.



1. **Page Close icon:** Closes your current page & returns you to the landing page.
2. **Page Title:** Description of Page, Acronym, page version and database
3. **Release & Submit buttons:** will appear when using workflows only
4. **Add & Retrieve buttons:** which are used with the Banner Document Management System
5. **Related Menu:** displays a list of pages that can be accessed from this page.
6. **Tools Menu:** which includes refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.
7. **Notification Center:** is located to the right of the Tools Menu and displays the following types of information messages:
 - a. Successful save of data message
 - b. Warning message
 - c. Error message
 - d. Informational message
 - e. Number of messages to be corrected to continue in the page

You may click in the box with the number in the page header to open or close the Notification Center.

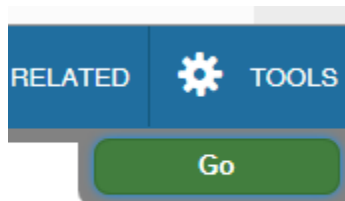
Key Block

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 may 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 arranged in a linear format. So to access the body of the page, populate the key block data and then click **Go**. You may return the key block if you are in the body of a page by clicking **Start Over**.

1. Enter the ID in the box
2. 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. This function allows you to quickly look up a value for a field.
3. Generate ID button – this will allow those individuals who may create records to generate a new record assigning the next available UserID.

If you tab to the Go Button after entering the ID it will display as below with white box within green box with: Go or when you select the Go button the button changes.



Sections

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



Each section contains related information. Sections of data are accessed by scrolling up and down the page using the scroll bar on the right. Some sections are accessed by using tabs that group information in a meaningful way.

1. **Carat icon** – clicking this icon will open or collapse the section information.
2. **Description** of the information contained in this section of information.
3. **Insert** – use this to insert records in the section.
4. **Delete** – use this to delete records in the section.
5. **Copy** – use this to copy records in the section.
6. **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.
7. **Filter** – use this to filter records in the section (search).

One record at a time: You may move from record to record using the pagination controls.

The screenshot shows a web interface for managing email information. At the top, there are tabs: 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail' (selected), 'Emergency Contact', and 'Additional Identification'. Below the tabs, the section is titled 'E-MAIL INFORMATION'. On the right side of this section, there are buttons for 'Insert', 'Delete', 'Copy', and 'Filter'. The main form area contains the following fields:

- 'E-mail Type' with a dropdown menu showing 'STOA' and a 'Personal Email Address' label.
- 'E-mail Address' with a text input field containing 'l.scheidt@twc.com'.
- Three checkboxes: 'Preferred' (unchecked), 'Inactivate' (unchecked), and 'Display on Web' (checked).
- A 'URL' checkbox (unchecked).
- A 'Comment' text input field.

At the bottom of the form, there are pagination controls: a set of navigation arrows and a dropdown menu showing '1 of 3' and 'Per Page'. A red box highlights these pagination controls. In the bottom right corner, it says 'Record 1 of 3'.

Multiple records in a sections: To Change the number of records that will display in a section if multiple record exist select the drop down arrow in the Per Page button the select the number of records that you want to review in a section.

The screenshot shows the 'E-MAIL INFORMATION' form. At the bottom, the 'Per Page' dropdown menu is open, displaying options: 1, 2, 3, 5, and 10. A red box highlights the dropdown menu, and a black arrow points to it. The form includes fields for E-mail Type (STOA), E-mail Address (l.scheidt@twc.com), and checkboxes for Preferred, Inactivate, Display on Web, and URL.

Display of multiple records after selecting Per Page display.

The screenshot shows the 'E-MAIL INFORMATION' form with three records displayed. The 'Per Page' dropdown menu is set to 5. The records are:

- E-mail Type: HOME, E-mail Address: bannertestid@yahoo.com
- E-mail Type: AHE, E-mail Address: one.test1@eku.edu
- E-mail Type: ABE, E-mail Address: test.one1@workingtoohard.com

Another example:

The screenshot shows the 'E-mail Address GOAEMAL 9.3.3 (TEST)' form. The 'Per Page' dropdown menu is open, displaying options: 1, 10, 20, 30, 40, and 50. A red arrow points to the dropdown menu. The form includes a table with columns: E-mail Type, E-mail Type Description, E-mail Address, Preferred, Inactivate, Display on Web, URL, and Comment.

The screenshot shows the 'E-mail Address GOAEMAL 9.3.3 (TEST)' form with three records displayed. The 'Per Page' dropdown menu is set to 10. The records are:

- E-mail Type: ABE, E-mail Type Description: Advancement Business E-mail, E-mail Address: test.one1@workingtoohard.com
- E-mail Type: AHE, E-mail Type Description: Advancement Home E-mail, E-mail Address: one.test1@eku.edu
- E-mail Type: HOME, E-mail Type Description: Home E-mail, E-mail Address: bannertestid@yahoo.com

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



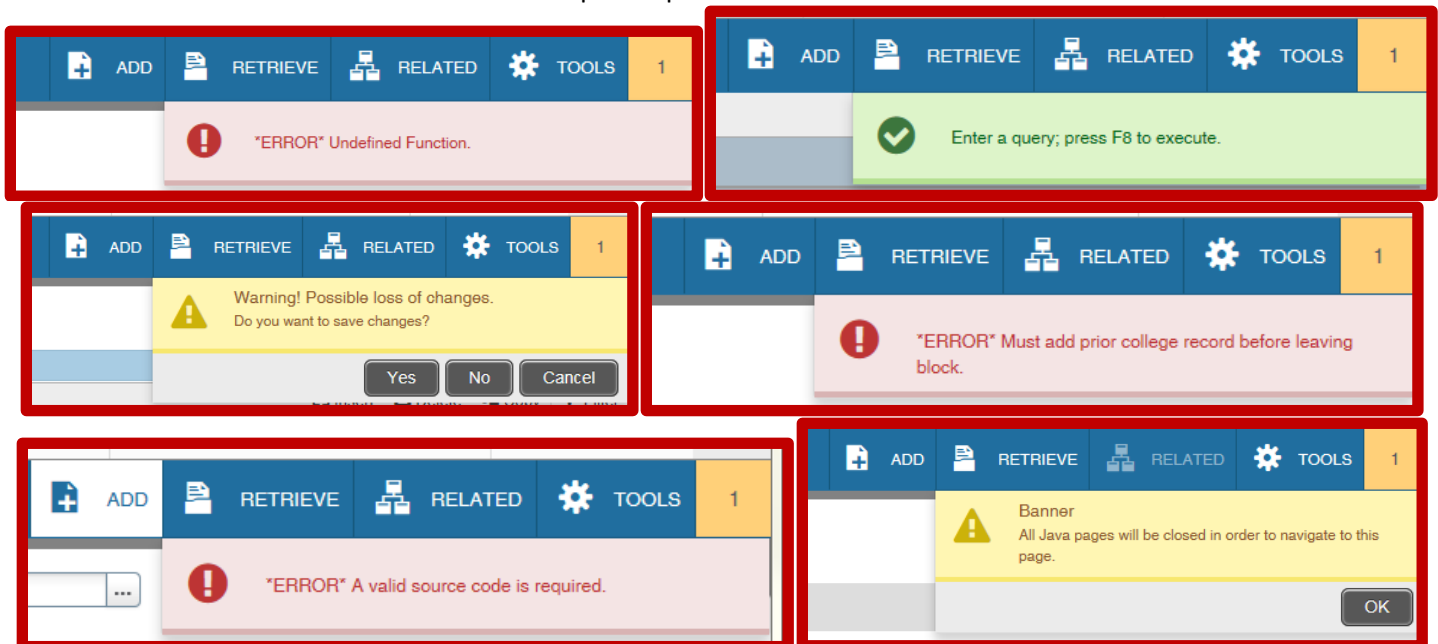
Always check your section areas for the different navigation functions and buttons.

Error Message Types

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

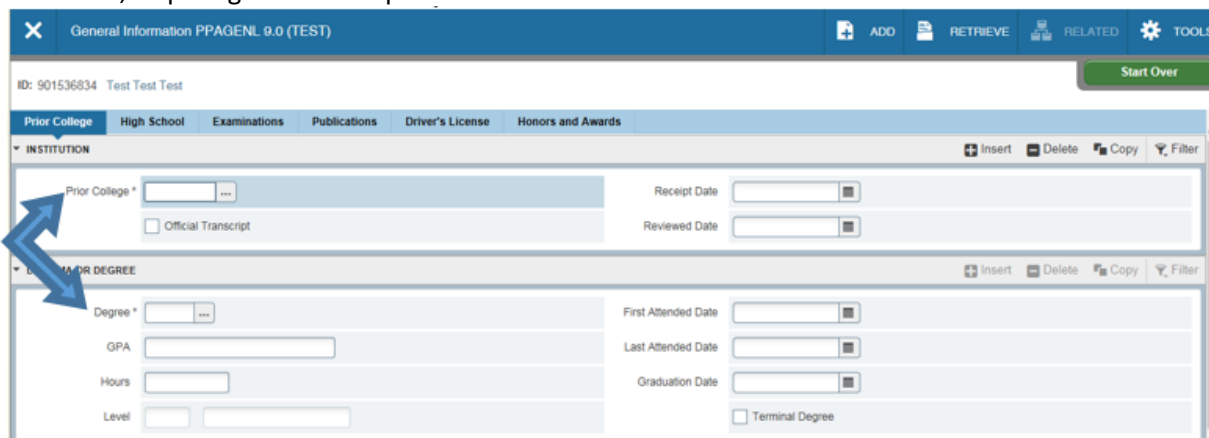
1. **Error Notification** – will display a “!” in a circle when message displayed
2. **Info Notification** – will display an “i” in a circle when message displayed. May display an OK button that you must select to continue.
3. **Success Notification** – will display a checkmark in a circle when message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

Examples of possible Notifications:



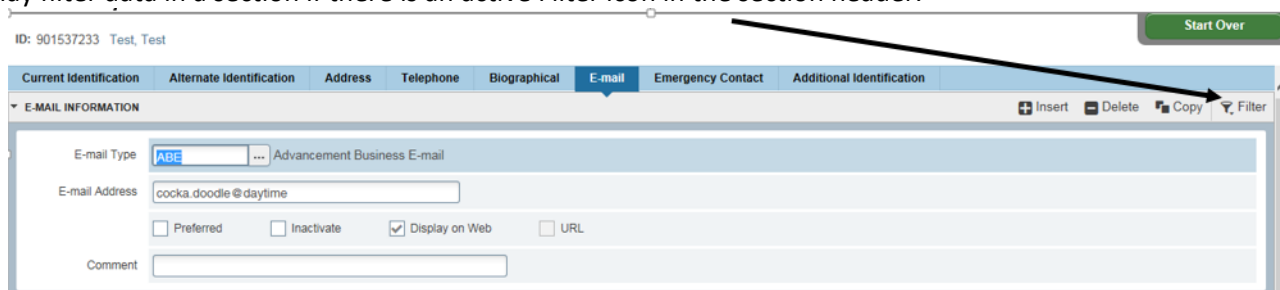
Required Fields

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

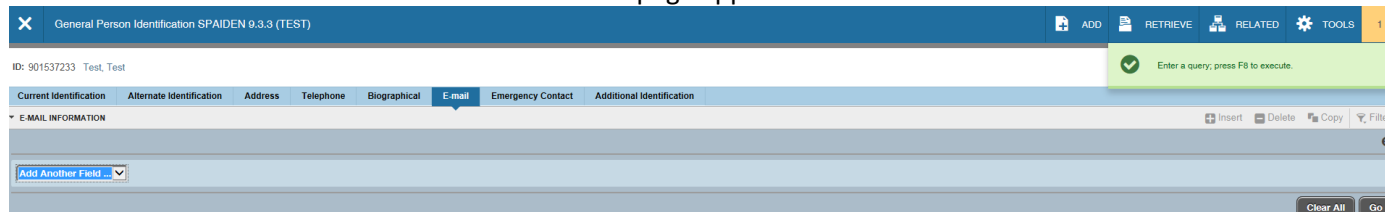


Filtering Data/Searching

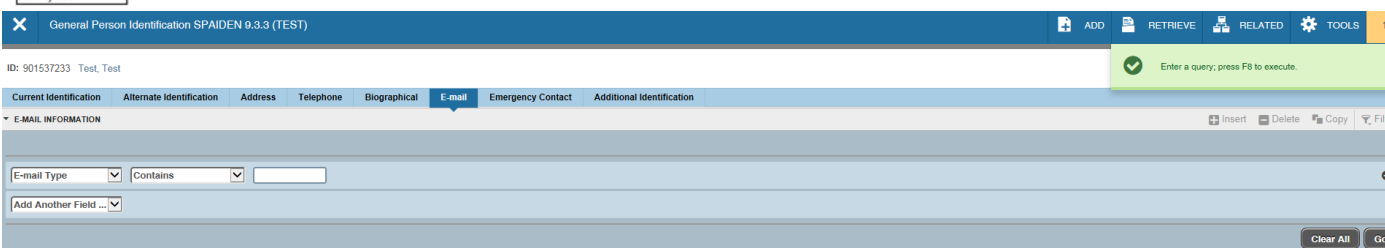
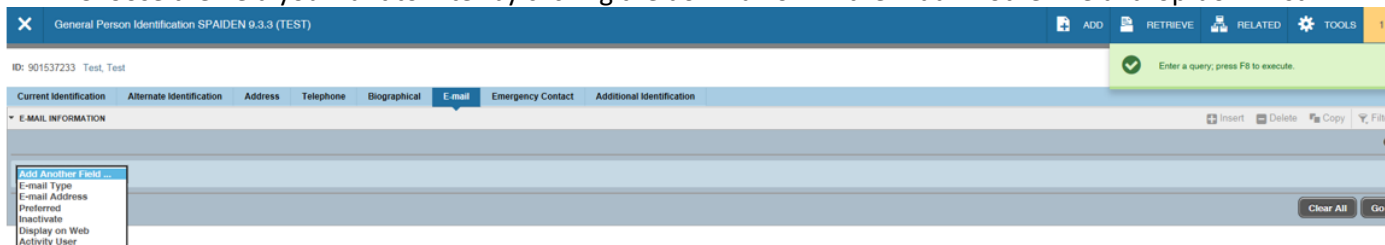
You may filter data in a section if there is an active Filter icon in the section header.



1. Click the active Filter icon for the section. New page appears:



2. Choose the field you want to filter by clicking the down arrow in the 'Add Another Field' drop-down list.



- 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 “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.

General Person Identification SPAIDEN 9.3.3 (TEST)

ID: 901537233 Test, Test

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

E-MAIL INFORMATION

E-mail Type Contains

Add Another Field ...

Clear All Go

- Enter a Value for the field that you selected.

General Person Identification SPAIDEN 9.3.3 (TEST)

ID: 901537233 Test, Test

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

E-MAIL INFORMATION

E-mail Type Contains FAST

Add Another Field ...

Clear All Go

Start Over

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

General Person Identification SPAIDEN 9.3.3 (TEST)

ID: 901537233 Test, Test

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

E-MAIL INFORMATION

E-mail Type Contains FAST

Display on Web Equals ☒

Add Another Field ...

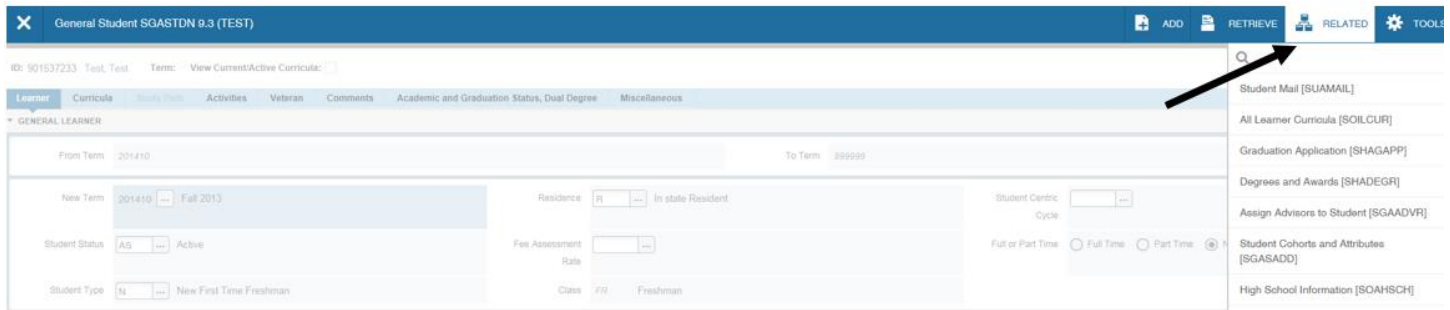
Clear All Go

Start Over

- When all the criteria is entered, click **Go** 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 by clicking the field label again.
- Optional:** If you want to perform another filter, click **Filter Again**.
- 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.

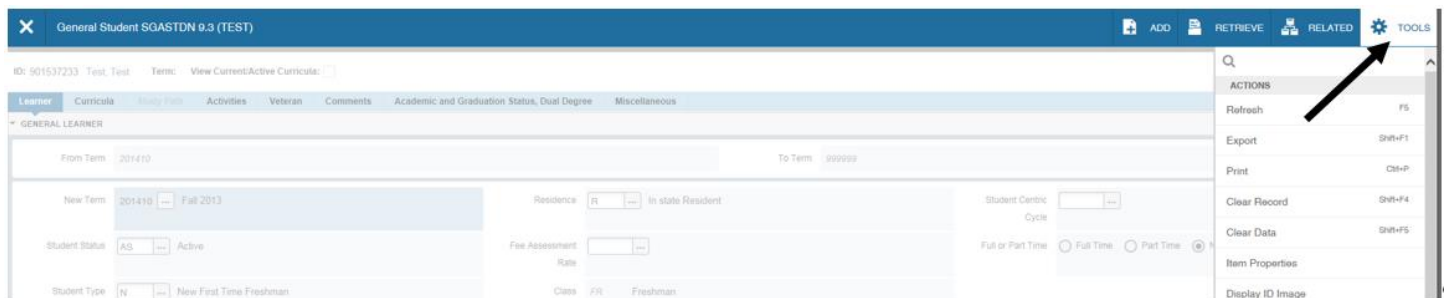
Related Button

Selecting the Related button will display a list of pages that may be accessed from this page.



Tools Menu

Tools Menu will include Actions and Options. Which includes actions Refresh, Export, Print, Clear Record, Clear Data, Item Properties, Display Id Image, Exit Quickflows and other options controlled by the page.



Help

Remember **Application Navigator** always provides online help for pages. Click the question mark “?” button in the **Application Navigator** header to open the help for the page in context. You may perform various actions in the help suite, for example, you may search for topics or print the information.




Sort Order

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

Search Function

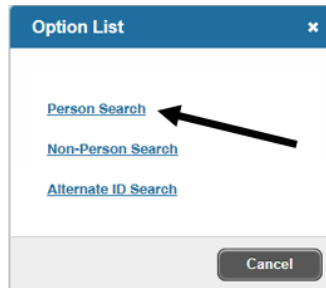
You will be able search for many items in Banner 9 – names, ID’s, birthdate, field values, etc. You may perform exact matches entering the exact ID, last name, first name or middle name when you are searching for a person or you may perform a partial match entering part of the ID, last name, first name or middle name and replacing the unknown part with a percentage sign (%).

Searching using %:

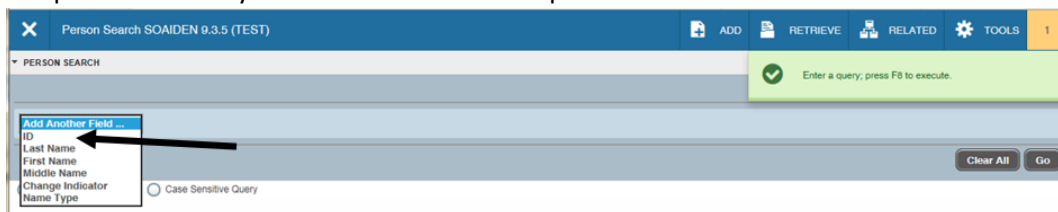
Select the search Icon  Use this process for searches where you know part of the ID



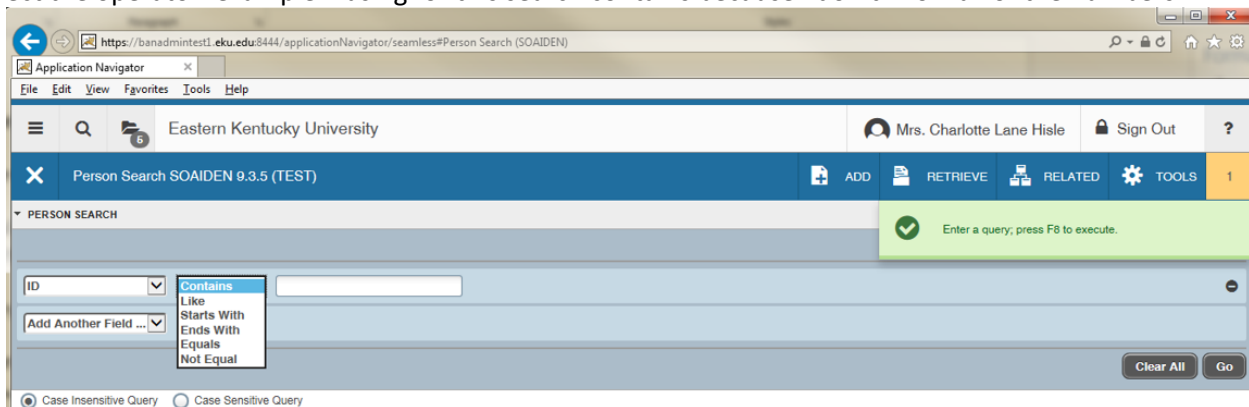
Now select the Person Search option from the selection box.



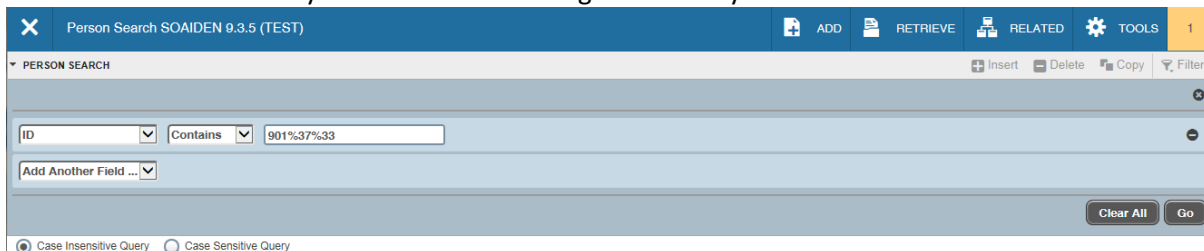
Now start the filter process: Select your first filter item: example – ID



Next select the operator: example – using for this search contains because I don't know all of the numbers.



Now enter the ID information that you know with a "%" sign for those you do not know.



Add additional filters if you have more information about the subject. Once all filters are entered. Select the GO button and your results should display.

Person Search SOAIDEN 9.3.5 (TEST)

PERSON SEARCH

ID Contains 901%37%33

Last Name Contains Test

Clear All Go

Now highlight your selection and select the Select button on the lower right of the form or you may also cancel.

Person Search SOAIDEN 9.3.5 (TEST)

PERSON SEARCH

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
901537233	Test	Test		01/29/12				

Record 1 of 1

ID will be returned to the calling page.

General Person Identification SPAIDEN 9.3.3 (TEST)

ID: 901537233 Test, Test

Go

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

Searching by Name using “%”: Once again select your search Icon – the icon with the 3 dots then select Person Search link from the Option List. Now select the first filter

Person Search SOAIDEN 9.3.5 (TEST)

PERSON SEARCH

ID Contains 901%37%33

Last Name Contains Test

Enter a query; press F8 to execute.

Clear All Go

Enter your next filter –

Person Search SOAIDEN 9.3.5 (TEST)

PERSON SEARCH

ID Contains 901%37%33

Last Name Contains Test

Enter a query; press F8 to execute.

Clear All Go

Now enter your search value:

Person Search SOAIDEN 9.3.5 (TEST)

PERSON SEARCH

Last Name: Test

Contains

Add Another Field ...

Case Insensitive Query Case Sensitive Query

Clear All Go

Enter more filters if you wish: I'm entering for first name now select the Go button

Person Search SOAIDEN 9.3.5 (TEST)

PERSON SEARCH

Last Name: Test

Contains

First Name: Te%

Contains

Add Another Field ...

Case Insensitive Query Case Sensitive Query

Clear All Go

Now highlight the record and select the Select button:

Person Search SOAIDEN 9.3.5 (TEST)

PERSON SEARCH

Filter Again

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
901:	GradTest	Testgrad	Test	11/30/80				
901:	Test	Test	Test	08/23/89				
901:	Test	Test	Test	08/01/82				
901:	Test	Test		01/29/12				
901:	Test	Testing						

1 of 1 Per Page

Record 4 of 5

Case Insensitive Query Case Sensitive Query

This will return the record to the SPAIDEN form that I started from.

Searching by Name: Enter the Last name followed by a comma and the first name in the name field. (Tab to get to the name field)

Eastern Kentucky University

Mrs. Charlotte Lane Hisle Sign Out ?

General Person Identification SPAIDEN 9.3.3 (TEST)

ADD RETRIEVE RELATED TOOLS

ID: [Search Icon] [Go]

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

ID: [Search Icon] Test, T% [Go]

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

Click your Enter/Return key.

ID will appear if it is a unique name. If not it will display an ID and Name Search Extended Search box: Select the Press To See Results button or the Person Search Detail button – not the Person/Non-Person button, this search is showing us that five records were returned for our search. Note: you may refine your search by using the options in the Reduce Search By area of the form.

Press to see Results button display: Will list the Name and ID results – highlight the one you want and select the OK button.

Selecting the Person Search Detail button for next example.

This opens the SOAIDEN page which list all of the individuals showing: ID, Last Name, First Name, Middle Name (could be initial with or without a period), Birth Date, Change Indicator (Name or ID) and Type (used by HR). To select the person from the list, you may either perform a double left click or select the select button. If the correct person not in the list select the cancel button.

Person Search SOAIDEN 9.3.5 (TEST)								
Performing Query On Name: TES% TEST								
PERSON SEARCH								
ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
901	Test	Test	Test	08/23/89				
901	Test	Test	Test	08/01/82				
901	Test	Test		01/29/12				
901	Test	Testing						

1 of 1 Per Page Record 1 of 4

☒ Case Insensitive Query ☐ Case Sensitive Query

SOAIDEN Person Search Page

The Person Search page may be accessed from all pages that require an ID number in the Key block. This page may be used to determine the correct ID number for a person using the query capabilities of the system.

From the Key Block area select the Lookup button:

...

Eastern Kentucky University

Mrs. Charlotte Lane Hisle Sign Out ?

General Person Identification SPAIDEN 9.3.3 (TEST)

ADD RETRIEVE RELATED TOOLS

ID:

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

Will display the Option List – Select the Person Search (SOAIDEN) link

Option List

[Person Search](#)

[Non-Person Search](#)

[Alternate ID Search](#)

Cancel

SOAIDEN page appears so you may enter your search criteria: Select Person Search for this example

Person Search SOAIDEN 9.3.5 (TEST)

ADD RETRIEVE RELATED TOOLS 1

PERSON SEARCH

Enter a query; press F8 to execute.

Add Another Field ...

Clear All Go

☒ Case Insensitive Query ☐ Case Sensitive Query

Select your first option: in the Add Another Field -- Example selected Last Name

Select the second option field Contains drop-down menu: Example for this search we will use “Starts With”

Returned information – now enter your Last Name search information in the blank field

Example enters – tes% -- Now add additional search fields if needed. We will add an additional field. (If you do not enter the “%” you will get the message: Query caused not records to be retrieved. Re-enter.

Second field will be First Name – Notice Last Name removed from list of choices

Second search set Contains Value – Starts with again

Person Search SOAIDEN 9.3.5 (TEST)

PERSON SEARCH

Last Name: tes Starts With: tes

First Name: t Starts With: t

Add Another Field ...

Clear All Go

☒ Case Insensitive Query ☐ Case Sensitive Query

Enter the First name search value. If you do not need to add another field then select the Go button to perform the search.

Person Search SOAIDEN 9.3.5 (TEST)

PERSON SEARCH

Last Name: tes Starts With: tes

First Name: t Starts With: t

Add Another Field ...

Clear All Go

Enter a query, press F8 to execute.

☒ Case Insensitive Query ☐ Case Sensitive Query

List of all the names that met your search will be returned – Review information – check your function buttons at the bottom right to either Cancel search or Select record from your search. If you do see the correct person select the record and double click or highlight and then select the Select button. Returns ID information to the calling page.

Person Search SOAIDEN 9.3.5 (TEST)

PERSON SEARCH

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
900:	Tesch	Todd	C.	06/08/68				
901:	Tesema	Tsemre-Dengil		01/21/88				
901:	Test	Test	Test	08/23/89				
901:	Test	Test	Test	08/01/82				
901:	Test	Test		01/29/12				
901:	Test	Testing						

Filter Again

Record 1 of 6

☒ Case Insensitive Query ☐ Case Sensitive Query

Using SOAIDNS to Help in Searching When Multiple Records

You may go to this page directly and if you do you will have to copy the ID information before you close the page so you may enter in the next page. You may open it from the SOAIDENS page when you are searching for individuals and when you have multiples with the same name you will request this page to get additional information such as addresses, majors, terms of attendance, etc.

First start with SPAIDEN and select the search icon:

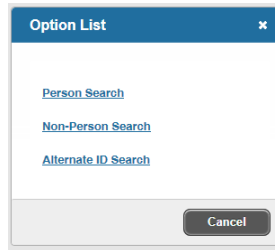
General Person Identification SPAIDEN 9.3.3 (TEST)

ID: .

Go

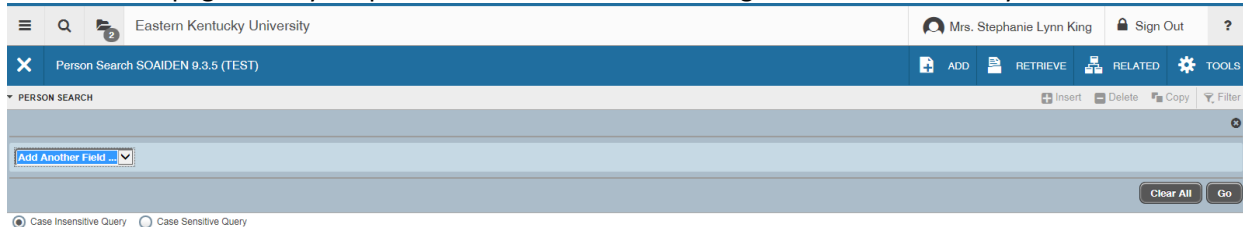
Get Started: Fill out the fields above and press Go.

Then from the Option List form select Person Search:



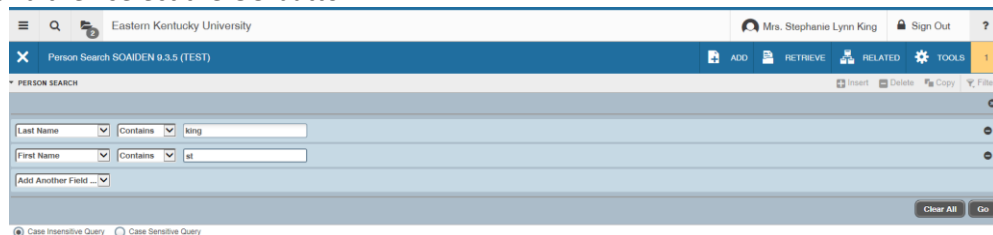
An 'Option List' dialog box with a blue header and a white body. It contains three blue hyperlinks: 'Person Search', 'Non-Person Search', and 'Alternate ID Search'. At the bottom right is a grey 'Cancel' button.

Then on the SOAIDEN page enter your person search information using all of the filters that you need.



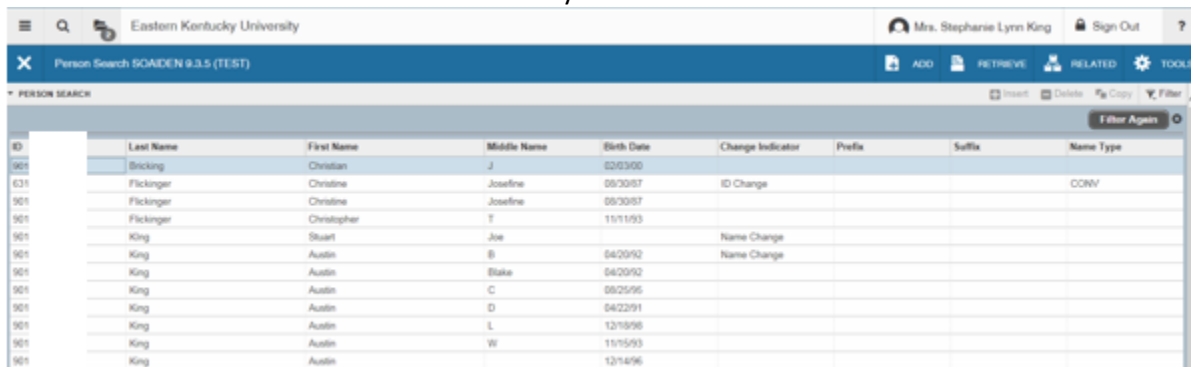
The 'Person Search SOAIDEN 9.3.5 (TEST)' form. It has a blue header with the Eastern Kentucky University logo and user information. Below the header is a toolbar with 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons. The main area is a search filter section with a dropdown 'Add Another Field' and a 'Go' button at the bottom right.

Enter search info and then select the GO button



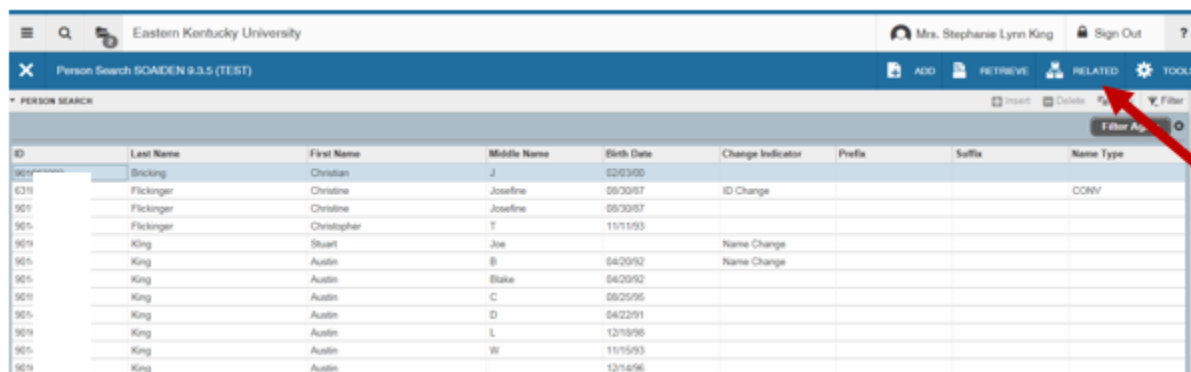
The 'Person Search SOAIDEN 9.3.5 (TEST)' form with search criteria entered. The 'Last Name' field contains 'king' and the 'First Name' field contains 'st'. The 'Go' button is highlighted in orange.

The page will return with all of the records that matched your search criteria



ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
901	Bricking	Christian	J	02/03/00				
631	Flickinger	Christine	Josephine	05/09/87	ID Change			CONV
901	Flickinger	Christine	Josephine	05/09/87				
901	Flickinger	Christopher	T	11/11/93				
901	King	Stuart	Joe		Name Change			
901	King	Austin	B	04/29/92	Name Change			
901	King	Austin	Blake	04/29/92				
901	King	Austin	C	05/25/95				
901	King	Austin	D	04/22/91				
901	King	Austin	L	12/18/98				
901	King	Austin	W	11/15/93				
901	King	Austin		12/14/96				

Now since you have individuals with the same name and you are not sure of Middle name or birthdate select the first one with the name and then select the Related button and then Select the Search and Display More Detail [SOAIDNS] link.



ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
901	Bricking	Christian	J	02/03/00				
631	Flickinger	Christine	Josephine	05/09/87	ID Change			CONV
901	Flickinger	Christine	Josephine	05/09/87				
901	Flickinger	Christopher	T	11/11/93				
901	King	Stuart	Joe		Name Change			
901	King	Austin	B	04/29/92	Name Change			
901	King	Austin	Blake	04/29/92				
901	King	Austin	C	05/25/95				
901	King	Austin	D	04/22/91				
901	King	Austin	L	12/18/98				
901	King	Austin	W	11/15/93				
901	King	Austin		12/14/96				

Enter your filter information: Make sure to enter the values – It is in a CASE SENSITIVE format
Now select the Go button

Person Search Detail SOAIDNS 9.3.3 (TEST)

PERSON SEARCH DETAIL

Last Name: King
First Name: Christina

ADDRESS DETAILS

Type	Type Description	Street	City	State or Province	ZIP or Postal Code	Nation	Nation Description	Area Code	Phone Number	From Date	To Date	Inactive Indicator
OS	Outside Source (DO ...	622 Ray Street Apart...	Harlan	KY	40831			606	2731594	03/29/2016		

ACTIVE EMAIL ADDRESSES

Email Address	Email Type	Email Type Description	Preferred	Display

Page will appear showing those records that met your filter information. Person Search Detail sections will display all of the records meeting your search criteria. As you select your record in the first section the information displayed in the other sections will pertain to that record. So as you're selecting records in the list you will be able to view other information about the person whose record you have activated.

Person Search Detail SOAIDNS 9.3.3 (TEST)

PERSON SEARCH DETAIL

ID	Last Name	First Name	Middle Name	Preferred First Name	Prefix	Suffix	Birth Date	Gender	Change Indicator
909	King	Christina	Elizabeth				07/04/1990	F	
900	King	Christina	M.				11/18/1976	F	Name Change
901	King	Christina	Marie				01/03/1984	F	

ADDRESS DETAILS

Type	Type Description	Street	City	State or Province	ZIP or Postal Code	Nation	Nation Description	Area Code	Phone Number	From Date	To Date	Inactive Indicator
OS	Outside Source (DO ...	622 Ray Street Apart...	Harlan	KY	40831			606	2731594	03/29/2016		
PA	Permanent Address	622 Ray Street, Apart...	Harlan	KY	40831-1650			606	2731594	03/06/2017		
RL	DO NOT CHANGE (I...	622 Ray Street, Apart...	Harlan	KY	40831-1650					05/02/2017		

ACTIVE EMAIL ADDRESSES

Email Address	Email Type	Email Type Description	Preferred	Display


Another record selected information in other sections has changed.

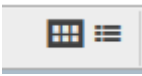

Once you find the record use the Select button (no key function) or a double left click – it will close the page and take the ID and Name back to the calling page.

Returns to SPAIDEN since that is the page were we started the process.

Single Record or Multiple Record Display Option

Some pages will allow for the display of a single record per section or will display a list of records for that information. You will be able to select an icon to change the display for those pages as needed. (There are not a number of these pages.)

You will be looking for this icon button  always to the left of the Insert button.

When the icon looks like this  the multiple record view is active – when the icon look like this  the single record view is active (you will only see that records information in the section and it will be in a different layout). To change views just select the icon.

Multiple record view for that section for the selected person.

Student Course Maintenance SHATCKN 9.3.3 (TEST)

ADD
 RETRIEVE
 RELATED
 TOOLS

ID: 90

Name: |

Term: 200410

Validation Check: Schedule

Start Over

COURSE DETAIL

Insert
 Delete
 Copy
 Filter

Cooperative Education

Components

CRN	Subject	Subject Description	Course	Course Title	Section	Campus	Campus Description	Repeat
10641	ACS	ACS Admin Communication	101	Introduction To Business	002	100	Richmond	None
10658	ACS	ACS Admin Communication	280	Office Procedures And Administ	001	100	Richmond	None

1 of 1

10 Per Page

Record 1 of 2

GRADES

Insert
 Delete
 Copy
 Filter

Sequence Number	Grade	Grade Mode	Grade Mode Description	Credit Hours	Attempted Hours	Change Reason	Change Reason Description	Extension Date
1			Courses over 8 year old.	0.000		OE	Original Entry	

1 of 1

10 Per Page

Record 1 of 1

LEVEL

Insert
 Delete
 Copy
 Filter

Code *	Code Description	Primary Level Indicator *
UG	Undergraduate	<input checked="" type="checkbox"/>

1 of 1

10 Per Page

Record 1 of 1

Single record view for that section for the selected person.

Student Course Maintenance SHATCKN 9.3.3 (TEST)		ADD	RETRIEVE	RELATED	TOOLS
ID: 90(Name:	Term: 200410	Validation Check: Schedule		
Start Over					
COURSE DETAIL					
CRN	10641 ...	Part of Term	f ... Full Term	College	BT ... College of Business & Tec
Subject	ACS ... ACS Admin Communication	Comment		Division	
Course	101 ... Introduction To Business	Start Date		Department	MMAC ... Mgmt, Marketing, & Admi
Section	002	End Date		Session	D ... Day Class
Campus	100 ... Richmond	Extension		Contact Hours	
Repeat	None	Long Course Title		Part of Term Start Date	08/20/2003
System		<input type="checkbox"/> Continuing Education Units		Part of Term End Date	12/09/2003
Schedule Type	B ... WEB Online 100%	Study Path			

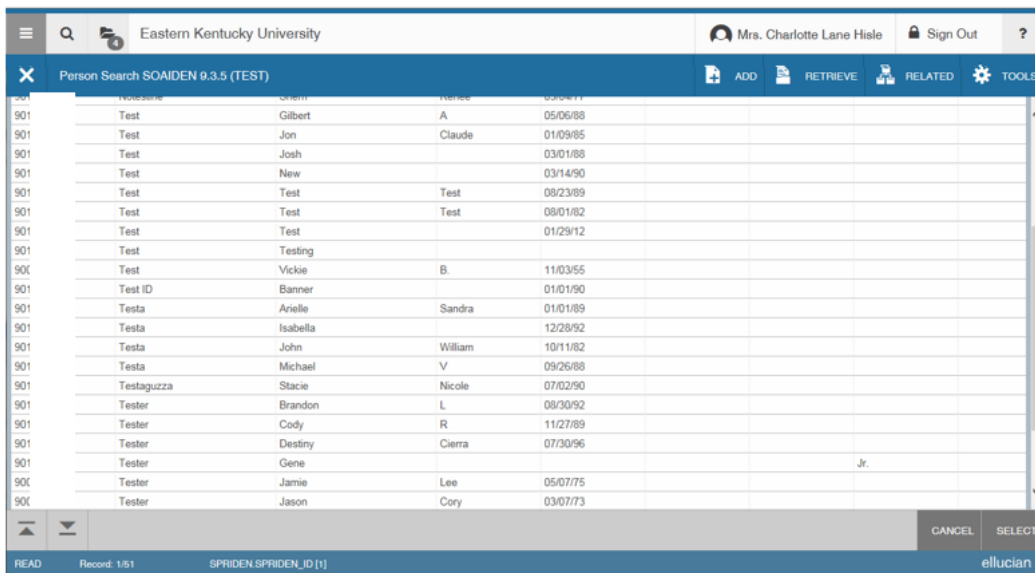
Cooperative Education Components

1 of 2 Per Page Record 1 of 2

GRADES

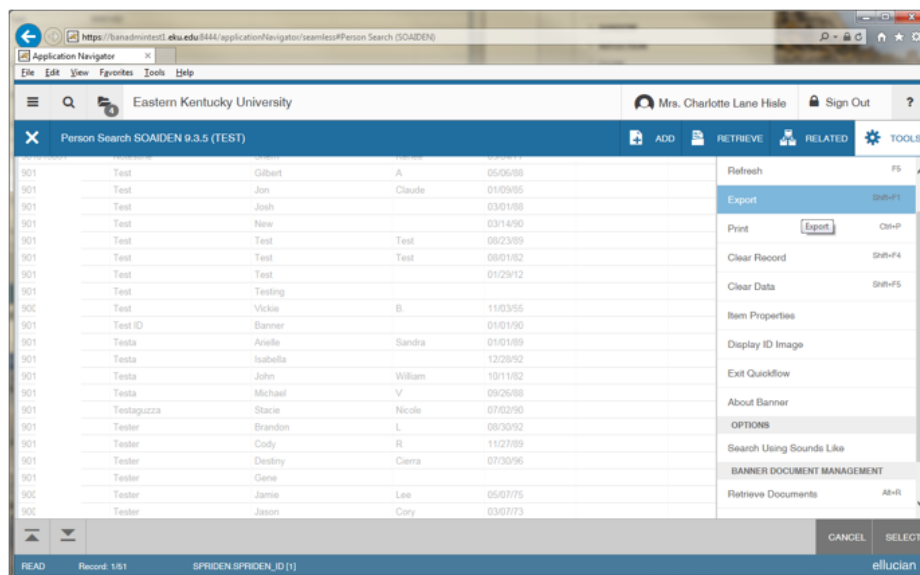
Exporting Data from Banner

Banner makes it very easy to export data from the sections of the pages. Once you have accessed the page go to the section that you wish to export the data. Select the Tools button.



Name	Surname	First Name	Last Name	Date of Birth
Test	Gilbert	A		05/06/88
Test	Jon	Claude		01/09/85
Test	Josh			03/01/88
Test	New			03/14/90
Test	Test	Test		08/23/89
Test	Test	Test		08/01/82
Test	Test			01/29/12
Test	Testing			
Test	Vickie	B.		11/03/55
Test ID	Banner			01/01/90
Testa	Arielle	Sandra		01/01/89
Testa	Isabella			12/28/92
Testa	John	William		10/11/82
Testa	Michael	V		09/26/88
Testaguzza	Stacie	Nicole		07/02/90
Tester	Brandon	L		08/30/92
Tester	Cody	R		11/27/89
Tester	Destiny	Cierra		07/30/96
Tester	Gene			
Tester	Jamie	Lee		05/07/75
Tester	Jason	Cory		03/07/73

Tools button selected – note all of the options – Select the Export link or Shift + F1



Name	Surname	First Name	Last Name	Date of Birth
Test	Gilbert	A		05/06/88
Test	Jon	Claude		01/09/85
Test	Josh			03/01/88
Test	New			03/14/90
Test	Test	Test		08/23/89
Test	Test	Test		08/01/82
Test	Test			01/29/12
Test	Testing			
Test	Vickie	B.		11/03/55
Test ID	Banner			01/01/90
Testa	Arielle	Sandra		01/01/89
Testa	Isabella			12/28/92
Testa	John	William		10/11/82
Testa	Michael	V		09/26/88
Testaguzza	Stacie	Nicole		07/02/90
Tester	Brandon	L		08/30/92
Tester	Cody	R		11/27/89
Tester	Destiny	Cierra		07/30/96
Tester	Gene			
Tester	Jamie	Lee		05/07/75
Tester	Jason	Cory		03/07/73

30

Depending on the Browser you are using – you should see a download message

This example is from IE 11:

Unable to export. No message at the bottom of the screen. Tried the old hacks of alt/ctrl and other combination of screens.

Select the download button and your spreadsheet will appear. Save it or do whatever you need to do with the information making sure to follow all IT security policies.

31

FireFox example: This box will appear.

Unable to export. No new window appears to save or open.

Chrome example:

Unable to export. No file at the bottom of the screen.

Shortcut for Entering Current Calendar Date

When you see the box for entering a date, if you are wanting to enter the current date you may do this process to load the date in the field instead of typing or doing the calendar lookup.

Enter any alpha character in the box – then press the Enter/Return key and your date will be loaded.

From Date	<input type="text"/>	From Date	<input type="text" value="H"/>	From Date	<input type="text" value="08/03/2017"/>
To Date	<input type="text"/>	To Date	<input type="text"/>	To Date	<input type="text"/>

My Banner Personal Menu (GUAPMNU)

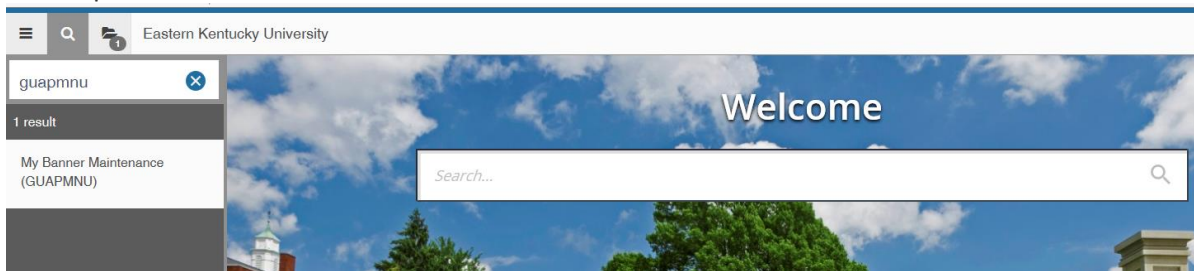
Use this page to create a personal menu tied to your Banner user ID. A personal menu contains the pages, jobs, menus, and Quickflows that are most important in your daily work. Once the personal menu is created, you may access it from the main menu.

Either enter the page name (GUAPMNU) or description in the Search Box field or select the Search Icon:

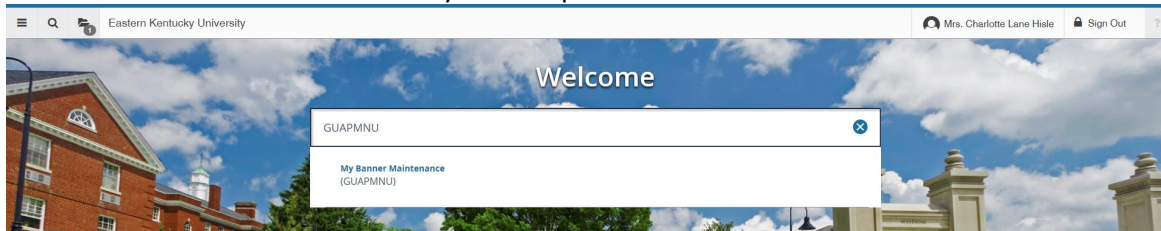
Search Box example:

The screenshot shows the Banner system interface. At the top, there is a navigation bar with the Eastern Kentucky University logo, a search icon, and a user profile for Mrs. Charlotte Lane Hisle with a 'Sign Out' button. Below the navigation bar is a large banner image with the word 'Welcome' in the center. Overlaid on the banner is a search box containing the text 'GUAPMNU'. Below the search box, a dropdown menu is visible, showing the result 'My Banner Maintenance (GUAPMNU)'.

Search Icon example:



Enter page name GUAPMNU and select Enter key or lookup icon:



Use this page to create a personal menu tied to your Banner user ID. A personal menu contains the pages, jobs, menus, and QuickFlows that are most important in your daily work.

When the personal menu is created, you can access it from the main menu.

This page contains three parts:

- The left pane lists the available pages, jobs, menus, or QuickFlows that may be added to a personal menu. When you select an object type from the pull-down list above this pane, a list of associated objects appears in the left pane.
- The middle of the page contains buttons used to insert your selections, remove selections, insert all items listed from the left pane, and remove all items from the right pane.
- The right pane lists the contents of the personal menu. The field above the right pane shows the Banner user ID associated with the person logged on to the system.

To add objects to a personal menu, select names in the left pane by double-clicking them, and then use the Insert or Insert All button. To remove objects from a personal menu, select names in the right pane by double-clicking them, and then use the Delete or Delete All button.

My Banner Maintenance GUAPMNU 9.0 (TEST)

ADD RETRIEVE RELATED TOOLS

Insert Delete Copy Filter

Menu Maintenance

Type * Oracle Forms module

Object *	Description *
TSA1098	1098-T Tax Information
FTMITYP	1099 Income Type Code Maintenance
FAA1099	1099 Reporting
FOA1099	1099 Transmitter Data Form
PXA1099	1099-R
PTV1099	1099-R Distribution Code Validation
RNAOV12	2011-2012 Applicant Override
REAO12	2011-2012 Grant Origination/Acknowledgement
RNIMS12	2011-2012 Miscellaneous Results Inquiry
RNANA12	2011-2012 Need Analysis
RNAVR12	2011-2012 Need Analysis Document Verification
RNRGL12	2011-2012 Need Analysis Global Policy Options Rules
RNAPR12	2011-2012 Need Analysis Processing
RNARS12	2011-2012 Need Analysis Result
RNASL12	2011-2012 Student Loan Data
RNASU12	2011-2012 Supplemental Need Analysis
RNAOV13	2012-2013 Applicant Override
READI13	2012-2013 Grant Disbursement/Acknowledgement
REAO13	2012-2013 Grant Origination/Acknowledgement
RNIMS13	2012-2013 Miscellaneous Results Inquiry

Record 1 of 2517

Insert Selection Remove Selection Insert All Remove All

Object	Description
SOAWDSP	Web Display List Customization
FGRACGT	Posting Process
FORAPPL	Approval Process
SIAASGN	Faculty Workload Information
SIAINST	Faculty/Advisor Information
SLARDEF	Room definition
SHARQTC	Transcript Request Form-Check to see when and where it was sent
SLABLDG	Building Definition Form
SFJDWAC	Dropped/Withdrawn From All Courses that Crystal runs
SPACMINT	Verify a Transfer transcript in Registrar's
SFJACTC	List of Prefixes offered for a specific term
SEAASGN	Orientation code form
SHATCKN	Student Course Maintenance
SIAASGQ	Faculty Schedule Query Form
GJASWPT	Sleep Wake Maintenance
SFAROST	Enrollment Verification Request
SFJEMAL	Faculty E-mail
GUAINST	Installation Controls
GUFYST	Pdgm Search
GUAOBJS	Object Maintenance

Record 1 of 21

Select the Object field in the left panel. You may search the page by name, description, or object name by clicking “F7” on your keyboard to clear the page. Select your filter information and do the filter process.

My Banner Maintenance GUAPMNU 9.0 (TEST)

MENU MAINTENANCE

Object: SPAIDEN

Filter

Select Go

My Banner Maintenance GUAPMNU 9.0 (TEST)

MENU MAINTENANCE

Type: Oracle Forms module

Object Type

Object *	Description *
SPAIDEN	General Person Identification

Object Selection

Object	Description
SOAWDSP	Web Display List Customization
FGRACGT	Posting Process
FORAPPL	Approval Process
SIAASGN	Faculty Workload Information
SIINST	Faculty/Advisor Information
SLARDEF	Room definition
SHARQTC	Transcript Request Form—Check to see when and where it was
SLBLDG	Building Definition Form
SFJDWAC	Dropped/Withdrawn From All Courses that Crystal runs
SPACMNT	Verify a Transfer transcript in Registrar's
SFJACTC	List of Prefixes offered for a specific term
SEAASGN	Orientation code form

Insert Selection
Remove Selection
Insert All
Remove All

Finds the SPAIDEN page now double click the Object Type

Object Type

Object *	Description *
SPAIDEN	General Person Identification

Then select the Insert Selection button:

Object Type

Object *	Description *
SPAIDEN	General Person Identification

Object Selection

Object	Description
SOAWDSP	Web Display List Customization
SPAIDEN	General Person Identification
FGRACGT	Posting Process

Page name inserted in the Object Selection panel – continue the process. Remember to select the Save button before leaving the page.

Object Type

Object *	Description *
SPAIDEN	General Person Identification

Object Selection

Object	Description
SOAWDSP	Web Display List Customization
SPAIDEN	General Person Identification
FGRACGT	Posting Process
FORAPPL	Approval Process
SIAASGN	Faculty Workload Information
SIINST	Faculty/Advisor Information
SLARDEF	Room definition
SHARQTC	Transcript Request Form—Check to see when and where it was
SLBLDG	Building Definition Form
SFJDWAC	Dropped/Withdrawn From All Courses that Crystal runs
SPACMNT	Verify a Transfer transcript in Registrar's
SFJACTC	List of Prefixes offered for a specific term
SEAASGN	Orientation code form
SHATCKN	Student Course Maintenance

Insert Selection
Remove Selection
Insert All
Remove All

SAVE

Shortcut to creating your Personal Menu list: Start with Object Selection Panel – Select first open record and type in you seven character page name or select the last record and arrow down to create next record -- type next page name – continue entering your page names. This is a living document so may modify it when needed. If you are ready to close page make sure to select the Save Icon before closing the page.

Unsaved page with error because name incorrectly typed:

Object Selection

Object	Description
SOAWDSP	Web Display List Customization
MLLKL	** Invalid object **
SPAIDEN	General Person Identification
FGRCTG	Posting Process
FORAPPL	Approval Process
SIAASGN	Faculty Workload Information
SIAINST	Faculty/Advisor Information
SLARDEF	Room definition
SHARQTC	Transcript Request Form—Check to see when and where it was sent
SLABLDG	Building Definition Form
SFJDWAC	Dropped/Withdrawn From All Courses that Crystal runs
SPACMNT	Verify a Transfer transcript in Registrar's
SFJACTC	List of Prefixes offered for a specific term

Buttons: Insert Selection, Remove Selection, Insert All, Remove All

Error message you will see if you do not save the page before you try to exit:

Object Selection

Object	Description
SOAWDSP	Web Display List Customization
SPAIDEN	General Person Identification
MLLKL	** Invalid object **
FGRCTG	Posting Process
FORAPPL	Approval Process
SIAASGN	Faculty Workload Information
SIAINST	Faculty/Advisor Information
SLARDEF	Room definition
SHARQTC	Transcript Request Form—Check to see when and where it was
SLABLDG	Building Definition Form
SFJDWAC	Dropped/Withdrawn From All Courses that Crvstal runs

Buttons: Insert Selection, Remove Selection, Insert All

Saved page:

My Banner Maintenance GUAPMNU 9.0 (TEST)

MENU MAINTENANCE

Type * Oracle Forms module

Object Type

Object *	Description *
SPAIDEN	General Person Identification

Object Selection

Object	Description
SOAWDSP	Web Display List Customization
SPAIDEN	General Person Identification
FGRCTG	Posting Process
FORAPPL	Approval Process

Buttons: ADD, RETRIEVE, RELATED, TOOLS

Message: Saved successfully (22 rows saved)

Keyboard Shortcuts for PC			
Function	Key Stroke	Old Function	Old Key Stroke
Application Navigator Display Open Items	CTRL + Y		
Application Navigator Search	CRTL + Shift + Y		
Application Navigator Help	CTRL + Shift + L	Help	Ctrl + H
Application Navigator Sign Out	CTRL + Shift + F		
Display the Menu	CTRL + M		
Open Main Menu	CTRL + Alt + M		
Open Related Menu	Alt + Shift + R		
Open Tools Menu	Alt + Shift + T		
Choose/Submit/Action	Return/Enter	Direct Access Box	Return/Enter
Next Section	ALT + Page Down	Next Block	Ctrl + Page Down
Previous Section	ALT + Page Up	Previous Block	Ctrl + Page Up
Cancel form, Exit, Close Current Page, Cancel Search or Query	Ctrl + Q	Exit, Cancel Query, Close Form	Ctrl + Q
Cancel Action	Esc		
Next Field/Item	Tab	Next Field	Tab
Page Tab 1, Page Tab 2, Page Tab 3, ...	CTRL + Shift + 1, CTRL + Shift + 2, CTRL + Shift + 3, et...		
Previous Field/Item	Shift + Tab	Previous Field	Shift + Tab
Export	SHIFT + F1		
Duplicate Item	F3	Duplicate Item	F3
Duplicate Selected Record	F4	Duplicate Record	F4
Clear One Record	Shift + F4	Clear Record	Shift + F4
Clear Page/Start Over/Refresh/Rollback	F5	Rollback	F7
Clear All in Section	Shift + F5		
Insert/Create Record	F6	Insert Record	F6
Delete Record	Shift + F6	Delete Record	Shift + F6
Search/Open Filter Query	F7	Enter Query	F7
Execute Filter Query	F8	Execute Query	F8
List of Values	F9	List of Values	F9
Save	F10	Save	F10
Print	CTRL + P	Print	Shift + F8
Up	Up Arrow	Previous line/row	Up Arrow
Down	Down Arrow	Next line/row	Down Arrow

Keyboard Shortcuts for PC

Function	Key Stroke	Old Function	Old Key Stroke
Next Page Down	Page Down	Scroll Down	Page-down
First Page	CTRL + Home		
Last Page	CTRL + End		
Edit	CTRL + E	Edit	Ctrl + E
Copy	CTRL + C	Copy	Ctrl + C
Cut	CTRL + X	Cut	Ctrl + X
Paste	CTRL + V	Paste	Ctrl + V
Undo	CTRL + Z		
Redo	CTRL + Shift + Z		
Select on a Called Page	ALT + S		
More Information	CTRL + Shift + U		
Retrieve BDM Documents	ALT + R		
Add BDM Documents	ALT + A		
Submit Work Flow	ALT + W		
Release Work Flow	ALT + Q		
Checkbox Autofill	Space bar	Checkbox auto fill	Space Bar
Today's Date Autofill	Any letter key, Enter	Today's Date autofill	Any letter key, Enter



EKU Eastern Kentucky University

Central Authentication Service (CAS)

Enter your Username and Password

Username:

Password:

☐ Warn me before logging me into other sites.

LOGIN | clear

For security reasons, please Log Out and Exit your web browser when you are done accessing services that require authentication!

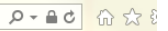
Languages:

[English](#) | [Spanish](#) | [French](#) | [Russian](#) | [Nederlands](#) | [Svenskt](#) | [Italiano](#) | [Urdu](#) | [Chinese \(Simplified\)](#) | [Deutsch](#) | [Japanese](#) | [Croatian](#) | [Czech](#) | [Slovenian](#) | [Catalan](#) | [Macedonian](#) | [Polish](#)

Copyright © 2012 Eastern Kentucky University
Powered by [Jasig Central Authentication Service 3.4.11](#)



<https://casauth.eku.edu/cas/logout?url=https://banadmintest1.eku.edu:8444/>



EKU Central Authentication...

EKU Eastern Kentucky University

Central Authentication Service (CAS)



Logout successful

You have successfully logged out of the Central Authentication Service.
For security reasons, exit your web browser.

Copyright © 2012 Eastern Kentucky University
Powered by [Jasig Central Authentication Service 3.4.11](#)