MISSISSIPPI STATE UNIVERSITY™
INFORMATION TECHNOLOGY SERVICES

SEPTEMBER 2018

ADMINISTRATIVE BANNER 9
QUICK NAVIGATION GUIDE

Application Navigator

Application Navigator provides a single interface to seamlessly navigate Administrative BANNER 9 pages. Sign in using the URL to access the page (*banner.msstate.edu*) and use the credentials provided by your institution to access Application Navigator. You can then use any of the following listed below to navigate within Application Navigator.
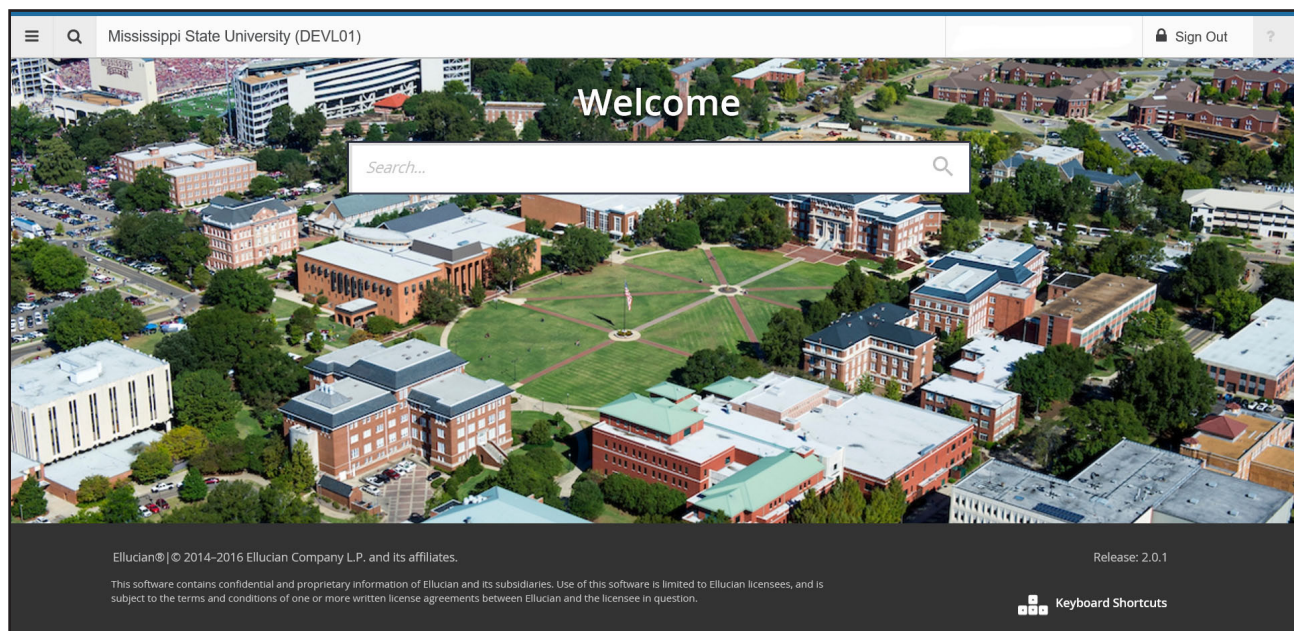
- **Menu icon.** The Menu icon is a group of three horizontal lines located in the upper left corner of the application. Click this icon to open the Banner Main Menu. Find the page you are interested in opening. Select the desired entry and click Enter. Clicking this icon will display or hide the menu and will display on any page.

- **Search icon.** The Search icon indicated by a magnifying glass is located in the upper left corner, just to the right of the Menu icon. It is used to find pages using key words or the seven-letter code/identifier of a page. Click on this icon to open or hide the Search window on any page.

- **Recently Opened icon.** The Recently Opened icon is indicated by an open file folder and is located in the upper left corner, just to the right of the Search icon. When a new page is opened, the number attached to the folder increases by one. When selected, the recently opened icon displays a list of recently opened pages in the current session. Open the list and select a page to access it from the current page or the Application Navigator.

- The **Sign Out** icon, indicated by a lock, is used to log out of Application Navigator.

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The **landing page** contains a search field in the center of the page which can be used to search for pages, jobs, or menus. To search, enter either the descriptive name of the page or the seven-letter code/identifier for the page. If a page is selected, that page will open. If a menu item is selected from the search results, the menu panel will open and the selected menu will be displayed. When an item is selected from the search results, the search results list is cleared.

You can return to the Application Navigator landing page by clicking on the **Mississippi State University** home link.

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

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

Basic Navigation

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

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Page Header

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

- Page close icon ☒
- Page title, which is formatted according to the preferences on the User Preference (GUAUPRF) page.
- Add and Retrieve icons, which are used with Banner Document Management.
- Related Menu, which displays a list of pages that can be accessed from this page (Options Menu in Banner 8).
- Tools Menu, which includes refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.
- Notification Center

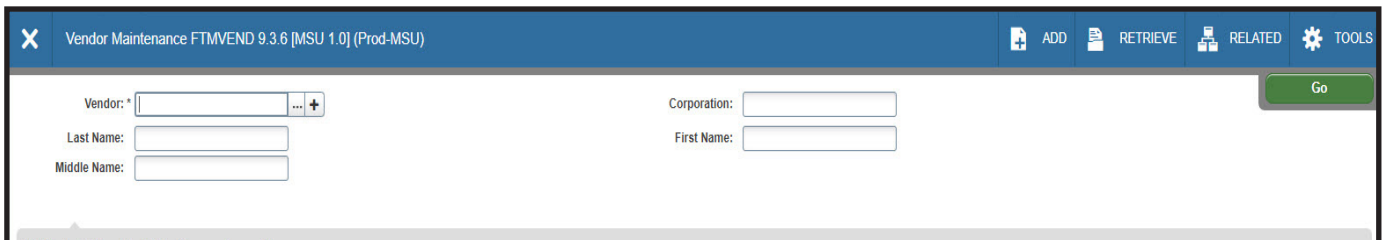The Notification Center is located to the right of the Tools menu and displays the following types of messages using specific colors to indicate the type of message:

- **Successful save of data**
- **Warning messages**
- **Error messages**
- **Informational messages**
- **Number of messages in the current session**
- Click on the number in the orange box located in the page header to open or close the Notification Center.

Key Block

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

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

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

To access the body of the page, populate the key block data and then click **Go**.

You can return to the key block if you are in the body of a page by clicking **Start Over**.

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Sections

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

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

If available, the sections can have a header that includes icons for the following actions:
- **Insert.** Use this to insert records in the section.
- **Delete.** Use this to delete records in the section.
- **Copy.** Use this to copy records in the section.
- **Filter.** Use this to filter records in the section.

Required fields

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

Sort Order

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

Dates

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

Lookup

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

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

System Control Fiscal Year List				✕
Criteria	🔍			
COA	FY	Start Date	End Date	
1	94	07/01/1993	06/30/1994	
1	95	07/01/1994	06/30/1995	
1	96	07/01/1995	06/30/1996	
1	97	07/01/1996	06/30/1997	
1	98	07/01/1997	06/30/1998	
1	99	07/01/1998	06/30/1999	
1	00	07/01/1999	06/30/2000	
1	01	07/01/2000	06/30/2001	
1	02	07/01/2001	06/30/2002	
1	03	07/01/2002	06/30/2003	

⏮ ◀ 1 of 2 ▶ ⏭   20 ▼ Per Page   Record 1 of 26

Cancel   OK
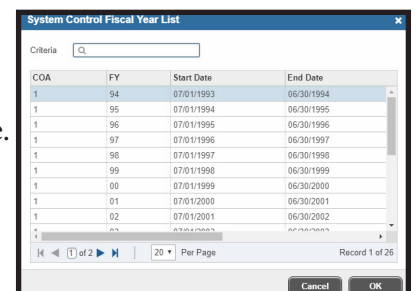
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Buttons

Banner transformation includes several buttons.

Button	Description
Add and Retrieve	Use the Add and Retrieve buttons to interact with Banner Document Management (xTender) to properly store and review documents.
Go	Use the Go button to advance to the body of the page after populating the key block.
Save	Use the Save button to save changes on the page. The Save button is 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 located at the bottom left of each page.
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, the Select and Cancel are presented at the bottom of the page.
Start Over	Use the Start Over button to return to the key block of the page.

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Filtering Data

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

You can filter data using the Basic and Advanced filter options. You can switch between the two filter options at anytime and the search fields will maintain the field values and filter criteria that you specify.

Basic Filter

Use Basic Filter to specify filter data using a customized list of search fields that provides a quick and simple way to enter a value into a field.

Procedure

1. Click the active Filter icon for the section.

The Basic Filter panel is the default filter and it displays the first five fields in the key block.

2. **Optional:** Add and remove fields from the filter criteria.
    a) To add a field, select the field from the **Add Another Field** drop-down list.
    b) To remove a field, select ⊖ on the top right side of the filter panel or select **Clear All** to remove all fields.

3. Enter a value for each field of the filter criteria that you select.

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Where applicable, you can click the LOV button to select a value from the list that appears.

You can use the following Basic operators when entering values into text fields.

Basic Operator	Advanced Operator
%A%	Contains
A%	Starts With
%A	Ends With
<> A	Not Equal
#IS NULL #OR <>	Not Equal or IS NULL
#IS NULL	IS NULL
#IS NOT NULL	IS NOT NULL
#Like	Identical to Contains, Starts With and Ends With

4. **Optional:** Switch to Advanced Filter by clicking **Advanced Filter.**

   This switches the filter panel to Advanced mode and retains the filter criteria that you previously specified.

   The operator that you select in Basic Filter mode converts to the appropriate Advanced operator as shown in the table above.

5. After you enter all filter criteria, click **Go** to display the filter results.

   The number of records retrieved displays at the bottom of the section. You can sort the results for a field in ascending or descending order by clicking on the field label in the column header. You can reverse the sort order by clicking the field label.

6. **Optional:** If you want to perform another filter, click **Filter Again**.

7. **Optional:** If you want to close the filter and display all unfiltered records, click the lowercase ❌ in the upper right corner of the filter window to close the filter.

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Advanced Filter

Use **Advanced Filter** to specify filter data using SQL type operators.

Procedure

1. Click the active Filter icon for the section.

    The Basic Filter panel displays. This is the default filter panel that opens.

2. Select Advanced Filter to switch to advanced filter mode.

    By default, the filter panel displays the first five fields in the key block.

3. **Optional:** Add and remove fields from the filter criteria.
    a) To add a field, select the field from the **Add Another Field** drop-down list.
    b) To remove a field, select ⊖ on the right side of the filter panel or select **Clear All** to remove all fields.

4. Choose an operator from the **Equals** drop-down list.

    The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other).

    The Equals and Contains operators are 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. Enter a value for each field of the filter criteria that you select.

✕	Payroll Calendar Rules PTRCALN		
PAYROLL CALENDAR RULE			
Basic Filter Advanced Filter			
Year ▾	Equals ▾	2015	
Payroll ID ▾	Equals ▾	AM	...
Number ▾	Equals ▾	1	
Pay of Month ▾	Equals ▾	1	
Start Date ▾	Equals ▾	04/01/2018	▤
Add Another Field ... ▾			

Where applicable, you can click the LOV button to select a value from the list that appears.

6. **Optional:** Switch to Basic Filter by clicking **Basic Filter**.

This switches the filter panel to Basic mode and retains the filter criteria that you previously specified.

The operator that you select in Advanced Filter mode converts to the appropriate Basic operator as shown in the table below.

Basic Operator	Advanced Operator
Contains	%A%
Starts With	A%
Ends With	%A
Not Equal	<>A
Not Equal or IS NULL	#IS NULL #OR <>
IS NULL	#IS NULL
IS NOT NULL	#IS NOT NULL
Identical to Contains, Starts With and Ends With	#Like

7. After you enter all filter criteria, click **Go** to display the filter results.

The number of records retrieved displays at the bottom of the section. You can sort the results for a field in ascending or descending order by clicking on the field label in the column header. You can reverse the sort order by clicking the field label.

8. **Optional:** If you want to perform another filter, click **Filter Again**.

9. **Optional:** If you want to close the filter and display all unfiltered records, click the lowercase ✕ in the upper right corner of the filter window to close the filter.

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Multiple Records

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

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

- **In a grid.** In this instance the data is presented in column and row format. You may need to scroll to view all the data. You can page through the records using the pagination controls (first, last, next, previous, or specific page number), decide how many records you want to review in the grid, and sort the data in ascending or descending order.

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BANNER 9 KEYBOARD SHORTCUTS

The following table lists the keyboard shortcuts that you can use to navigate through Banner 9.

ACTION	KEYSTROKE
1. Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL+Q
2. Choose/Submit	ENTER
3. Clear All in Section	SHIFT+F5
4. Clear One Record	SHIFT+F4
5. Clear Page or Start Over	F5
6. Count Query	SHIFT+F2
7. Delete Record	SHIFT+F6
8. Down/Next Record	DOWN ARROW ↓
9. Duplicate Item	F3
10. Duplicate Selected Record	F4
11. Edit	CTRL+E
12. Execute Filter Query	F8
13. Exit	CTRL+Q
14. Expand/Collapse Drop-down Field	ALT+DOWN ARROW ↓
15. Export	SHIFT+F1
16. First Page	CTRL+HOME
17. Insert/Create Record	F6
18. Last Page	CTRL+END
19. List of Values (LOV)	F9
20. Next Field or Item	TAB/ENTER
21. Next Page Down	PAGE DOWN
22. Next Section	ALT+PAGE DOWN
23. Open Menu Directly	CTRL+M
24. Open Related Menu	ALT+SHIFT+R
25. Open Tools Menu	ALT+SHIF+T
26. Page Tab 1	CTRL+SHIFT+1
27. Page Tab 2 and so on	CTRL+SHIFT+2 and so on
28. Previous Field or Item	SHIFT+TAB
29. Previous Page Up	PAGE UP
30. Previous Section	ALT+PAGE UP
31. Print	CTRL+P
32. Refresh or Rollback	F5
33. Save	F10
34. Search or Open Filter Query	F7
35. Select on a Called Page	ALT+S
36. Toggle Multi/Single Records View	CTRL+G
37. Up/Previous Record	UP ARROW ↑
38. Toggle Accessibility Mode ON/OFF for current session	CTRL+B
39. Application Navigator – Banner Menus	CTRL+M
40. Application Navigator – Display Recently Opened Items	CTRL+Y
41. Application Navigator – Side Search	CTRL+SHIFT+Y
42. Application Navigator – Sign Out	CTRL+SHIFT+F

Page Layout

You can toggle between Compact page layout (default) or Expanded page layout by selecting the page layout option on the Tools menu. There are two different page layout options to choose from:

- Compact (default) - This layout reduces the amount of excessive white space on pages and increases the amount of information visible on a page, limiting the need to scroll vertically.

- Expanded - This layout displays pages with increased white space and reduces the amount of information visible on a page. This may result in the need to scroll to see all of the information.

You can switch between Compact page layout and Expanded page layout by clicking **Tools** > **Page Layout** and selecting either **Expanded** or **Compact**. The page layout that you select remains active for your browser session. When you close your browser, the page layout reverts to the default Compact the next time you open a new browser session and log into Application Navigator.

Print

Printing is most effective when using the Compact Page layout.

Compact Page layout provides for the best fixed width printing ratio. You can reorder columns to move the most important data to appear first and ensure that these columns are visible on the printed page.

Data Export

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

Item Properties

Item Properties lists all properties for the field where the cursor is currently located.

Item properties include the field's internal database name, whether it is required, type of data (character or numeric), maximum length, and other characteristics of the field. The specific properties that are displayed depend on the type of field. To display Item Properties for a field, place the cursor in the field and select **Tools > Item Properties.**