Common Banner 9 Features/Functions

Keyboard Shortcuts

ID Searching:

Common Banner 9 Features/Functions

Login Page

Log in using your RCS userid and password

Login

Username:

Password:

LOGIN

? Forgot your password?

For security reasons, please log out and exit your web browser when you are done accessing services that require authentication!

Rensselaer Theme
Application Navigator 443

Links to CAS Resources

⚙ Dashboard

📄 Documentation

🐞 Issue Tracker

✉ Mailing Lists

💬 Chatroom

🔊 Blog

Welcome Page

Search for a form using the 7-character Banner name, or using common language, or use the Navigation Bar

Navigation Bar
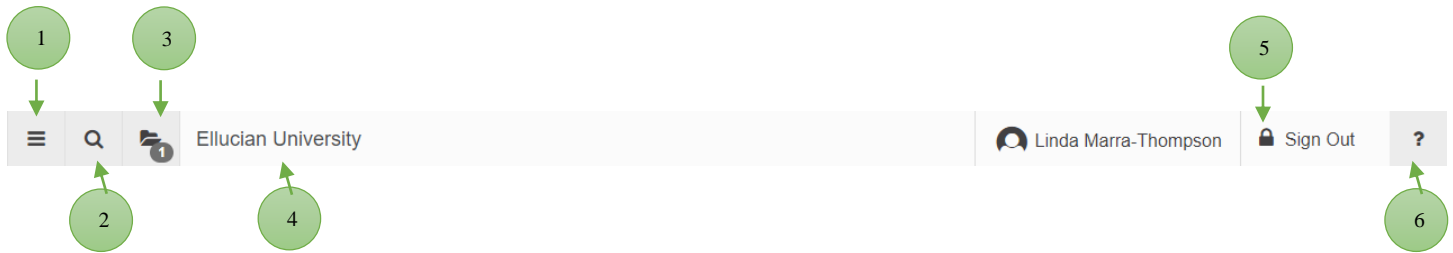
1. Menu (Ctrl + M) – Provides access to Banner Menu (also called "Hamburger Menu")
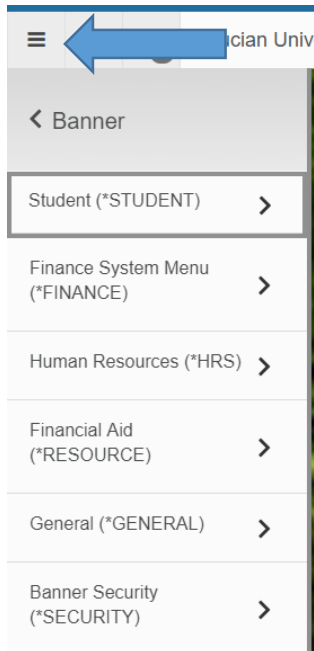
2. Search (Ctrl + Shift + Y) – Provides quick access to search for another form
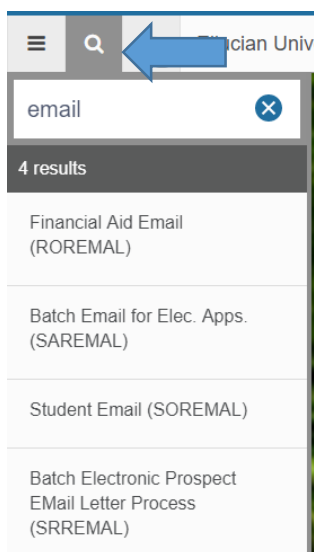
3. Recently Opened (Ctrl + Y) – Provides quick access to recently opened forms
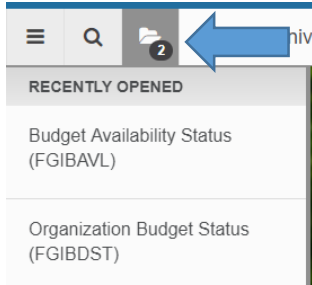
4. Ellucian University – Select to return to the Welcome page at any time

5. Sign Out (Ctrl + Shift + F) – Select to sign out of all Single Sign On applications
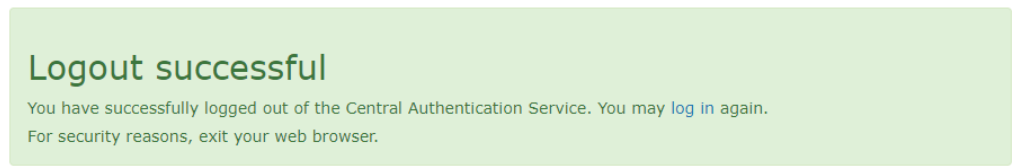
6. Help (Ctrl + Shift + L) – Accessible from any form in Banner – Will take you to online help which will provide more information about the form you are accessing.
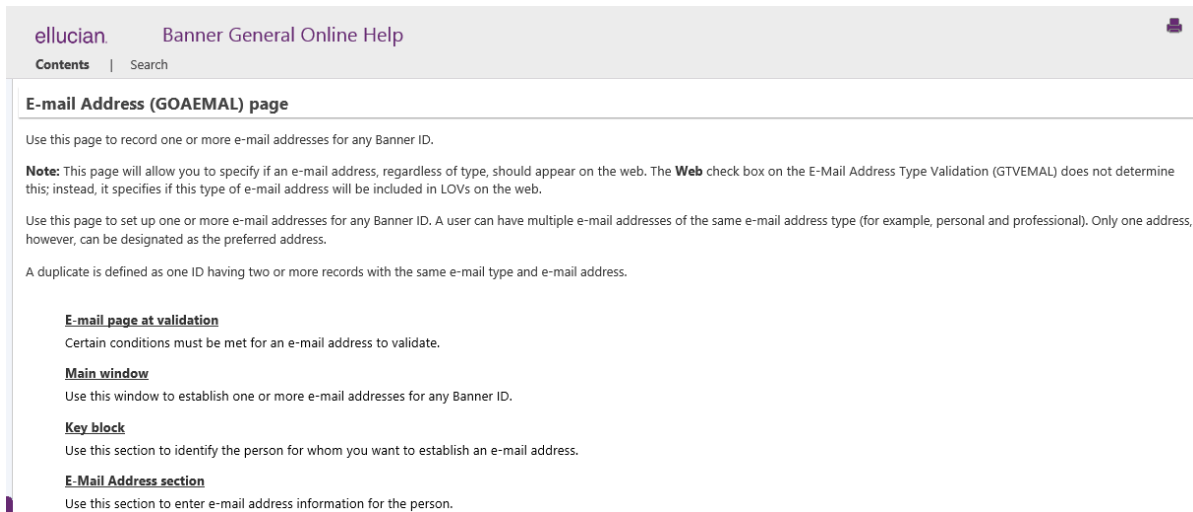
Form Header

1. Exit (Ctrl + Q) – Close form
2. Form Name, version and instance (BNRDEV9)
3. Related (Alt + Shift + R) – Provides quick access to related forms
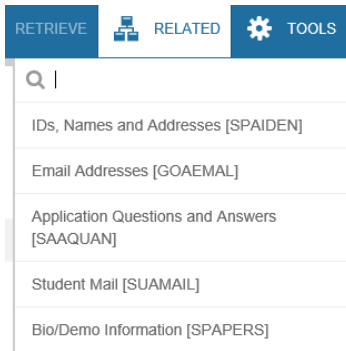
4. Tools (Alt + Shift + T) – Provides access to Actions and Options

Notifications

Clear obvious messages notifying user of information, successful actions, warnings and errors.

RETRIEVE	RELATED	TOOLS	1
✓ Saved successfully (1 rows saved)			

RETRIEVE	RELATED	TOOLS	1
❗ *ERROR* Invalid Change Indicator value.			

RETRIEVE	RELATED	TOOLS	1
ℹ️ Banner Please select the type of change from available list.			
			OK

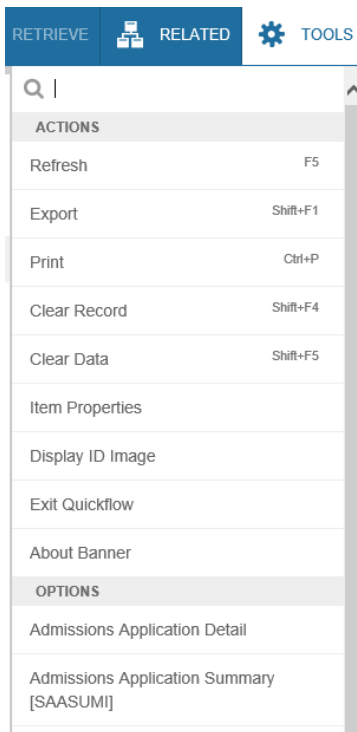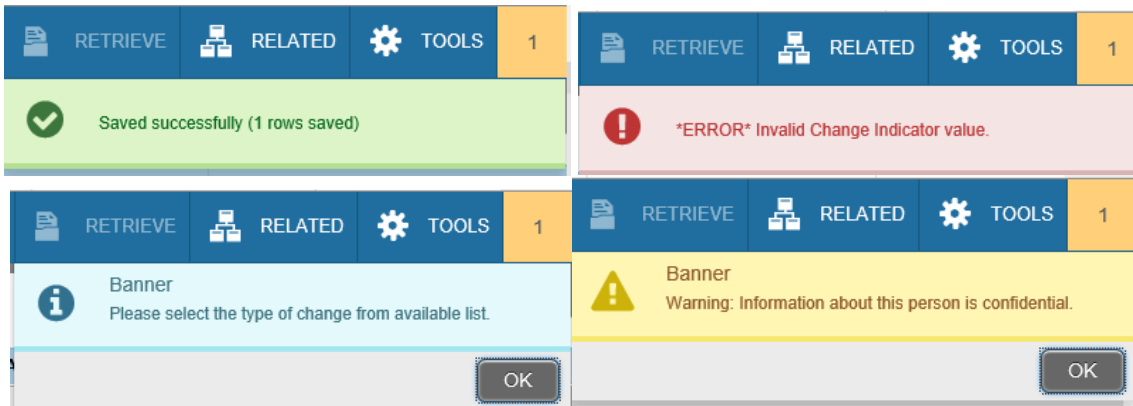| RETRIEVE	RELATED	TOOLS	1
⚠️ Banner Warning: Information about this person is confidential.			
			OK

Record Navigation

⑴ ⑶ ⑸   ⑺

|◄ ◄ [1] of 5 ► ►| | 1 ▾ Per Page   Record 1 of 5

⑵ ⑷ ⑹

1. First Page – Navigate to first page of records
2. Previous Page (↑)– Navigate to previous page of records
3. Record – Quickly navigate to a specific record by entering the record number
4. Next Page (↓) – Navigate to next page of records
5. Last Page – Navigate to last page of records
6. Per Page Drop-down – Select to change number of records displayed on screen
7. Record Count – Shows which record you have selected and the total number of records

Common Actions/Features

➕ Insert   ➖ Delete   ▣ Copy   ▽ Filter

(Buttons will be grey when not usable)

Insert (F6) – create a new record
Delete (Shift + F6) – delete selected record
Copy (F4) – Copy selected record
Filter (Query Mode) (F7) – Filter records/enter query mode
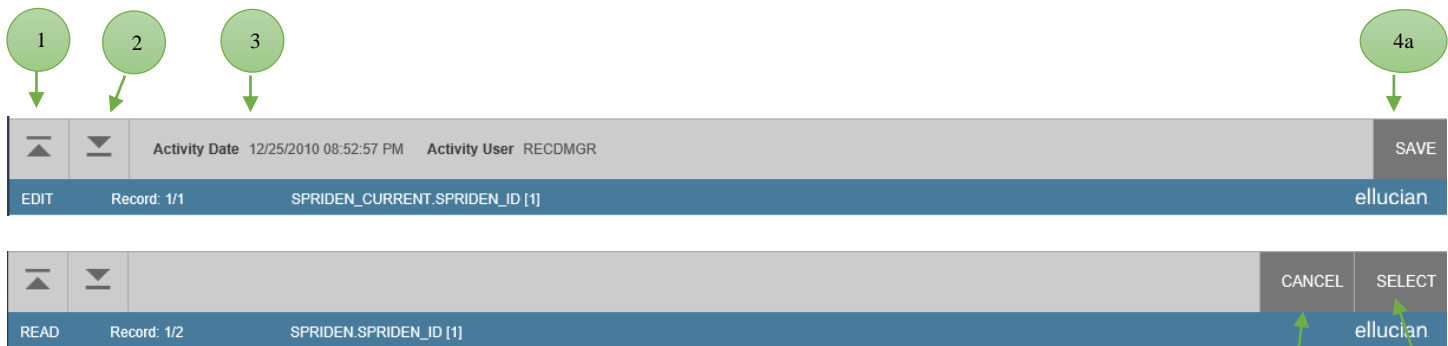   Execute (F8) – While in query mode, press Go to execute
       Exit Query (Ctrl + Q) – Press X –Exit- to exit query mode

| | ... |

List of Values (F9) – Select the ellipsis (…) on any field to see a list of valid values.

Form Footer

1. Previous Selection (Alt + Pg-Up) – Navigate to previous Block/Tab/Page
2. Next Selection (Alt + Pg-Down) – Navigate to next Block/Tab/Page
3. Record Information – may contain Activity Date and User
4. Action Buttons
   a. Save (F10) – save current changes
   b. Cancel (Ctrl + Q) – cancel selection
   c. Select (Alt + S) – select and return value

List of Keyboard Shortcuts

Cancel	Ctrl + Q
Copy	F4
Delete	Shift + F6
Exit (close form)	Ctrl + Q
Filter/Query Mode - Enter	F7 *
Filter/Query Mode - Execute	F8
Filter/Query Mode - Exit	Ctrl + Q
Help	Ctrl + Shift + L
Insert	F6
List of Values	F9
Menu	Ctrl + M
Next Record	↓ (Down Arrow)
Next Selection	Alt + Pg-down
Previous Record	↑ (Up Arrow)
Previous Selection	Alt + Pg-up
Recently Opened	Ctrl + Y
Related Forms	Alt + Shift + R
Save	F10
Search	Ctrl + Shift + Y
Select	Alt + S
Sign Out	Ctrl + Shift + F
Tools	Alt + Shift + T

* This keystroke conflicts with Firefox browser feature

WHAT is a name search?

1. A name search is a way to look through the Banner system to find the ID of someone who may have records within the system.
2. It is the way to identify if a person has multiple IDs within the system.

WHO needs to do a name search?

1. Anyone who is using the system to view someone's records.
2. Anyone who is entering data into the system.

WHY must a name search be done?

1. To make sure data is entered into the right person's record.
2. To make sure each person's data can be easily accessed.
3. To make sure each person's record is accurate and complete.

WHEN must a name search be done?

1. Anytime someone's records are viewed.
2. Anytime data entry is done on a person's records.

INFORMATION about Name Searching

1. Name Searching is not case sensitive.
2. Name Searches can be done from ANY form that requires an ID.
3. Always use the wildcard (See: USING the WILDCARD).
4. Enter as few letters in the name as possible to get the broadest search.
5. Searches may be done on only last names, only first names or on both first and last names.
6. Be cautious when searching on first names that could be "nick" names.
   Examples: Bill/William, Tony/Anthony, Beth/Elizabeth, Debbie/Debra, Cathy/Catherine, Rick/Richard
7. Be cautious of multiple spellings of names. The Sounds Like feature may be of assistance (Pg 9 Step 7).
   Examples: Cathy/Kathy, Lori/Laurie, Anderson/Andersen, McDonald/Mc Donald

USING the WILDCARD

1. The '%' sign is used as the wildcard.
2. ALWAYS use the wildcard.
3. You may use more than one wildcard in each name field.
4. Wildcards may be placed anywhere in the name field.
5. Without the wildcard the system will look for an exact match.

NAME SEARCH EXAMPLES

Name:	LAST NAME field:	FIRST NAME field:
Bob McDonald	Mc%on%	%ob%
Sue Smythe	Sm%th%	Su%
Cathy Larson-White	%Lar%	%ath%
	%Whi%	%ath%
Larry Andersen	Ander%	L%

1. From any form with an ID field, Click on the ellipsis (...)

	General Person Identification SPAIDEN 9.3.3 (TEST)	ADD	RETRIEVE	RELATED	TOOLS

ID: [... +]

Go

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

2. Select Person Search

Option List

Person Search

Non-Person Search

Alternate ID Search

Cancel

3. From the drop down list, select Last Name

	Person Search SOAIDEN 9.3.3 (TEST)	ADD	RETRIEVE	RELATED	TOOLS	1

▼ PERSON SEARCH

Enter a query; press F8 to execute.

Add Another Field ...
ID
Last Name
First Name
Middle Name
Change Indicator
Name Type

Clear All   Go

○ Case Sensitive Query

4. Enter a portion of the Last Name
5. Select First Name from the drop down and enter a portion of the First Name

	Person Search SOAIDEN 9.3.3 (TEST)	ADD	RETRIEVE	RELATED	TOOLS	1

▼ PERSON SEARCH

Enter a query; press F8 to execute.

Last Name	▼	Contains	▼	Test	⊖
First Name	▼	Contains	▼	Tay	⊖
Add Another Field ...	▼				

Clear All   Go

● Case Insensitive Query   ○ Case Sensitive Query

     a.   Note: Wildcards % are permitted but not required – see example below

	Person Search SOAIDEN 9.3.3 (TEST)	ADD	RETRIEVE	RELATED	TOOLS	1

▼ PERSON SEARCH

Enter a query; press F8 to execute.

Last Name	▼	Contains	▼	Te%t	⊖
First Name	▼	Contains	▼	%ay	⊖
Add Another Field ...	▼				

Clear All   Go

Release 9.x   Navigation Info

6. Press Go (F8) – The results will be displayed

7. Review the records. If you have located the desired record, and select it and click Select (Alt +S). You will return to the previous screen with the ID populated. If you still don't see the student you are looking for, see 7a-c below

    a. Select Filter Again (F7) and add more criteria (Return to Step 3), or select Next Selection (Alt + Pg-down)

    b. The Sounds Like window will appear

    c. Enter your search criteria and select Search – Return to step 7.
       Do not use wildcards % in the Sounds Like search