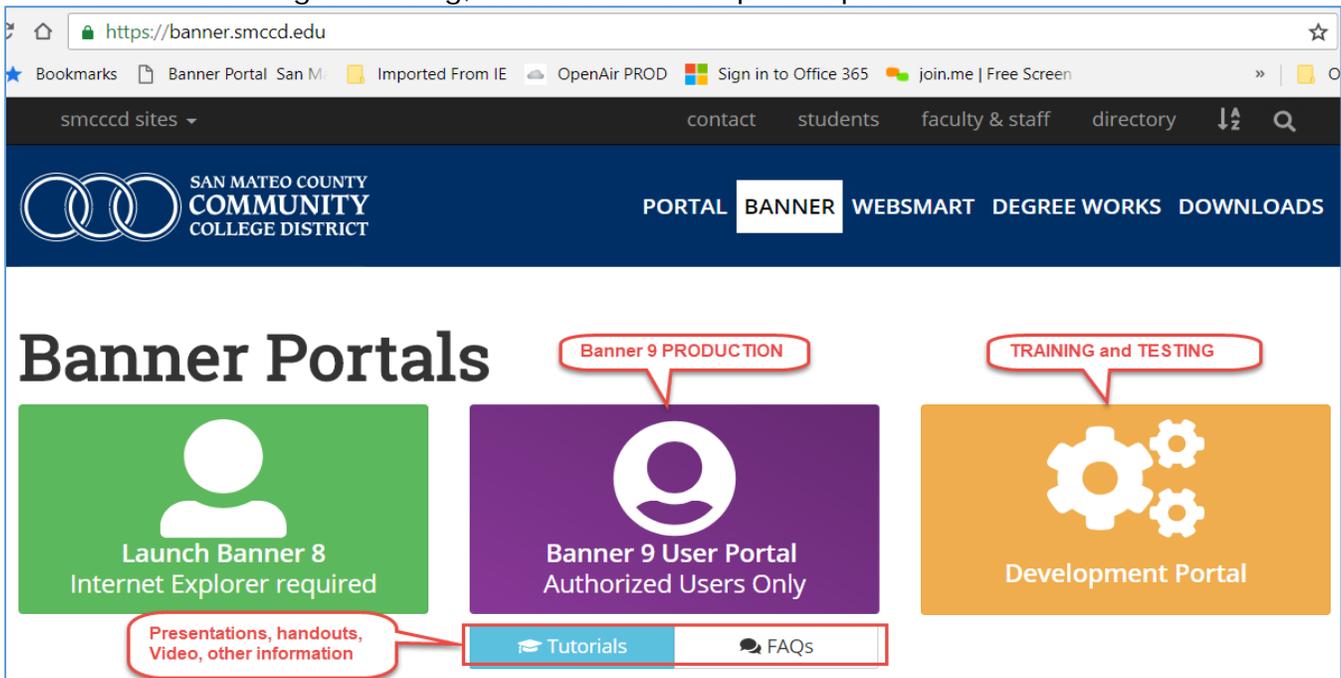


**San Mateo Community College District**  
**BANNER 9**  
**Using APPLICATION NAVIGATOR**  
**August 29, 2018**

**SIGNING into BANNER 9 Application Navigator:**

1. Browser Considerations:
  - a. Banner 9 will run on Chrome, Internet Explorer, Firefox, and Safari. You are able to have multiple tabs or browsers open.
  - b. Banner 8 can still be accessed through the regular menu using Internet Explorer.
2. **SIGNING into BANNER** – from "<https://banner.smccd.edu/>" select the "Banner 9 User Portal. If training or testing, select the Development portal.



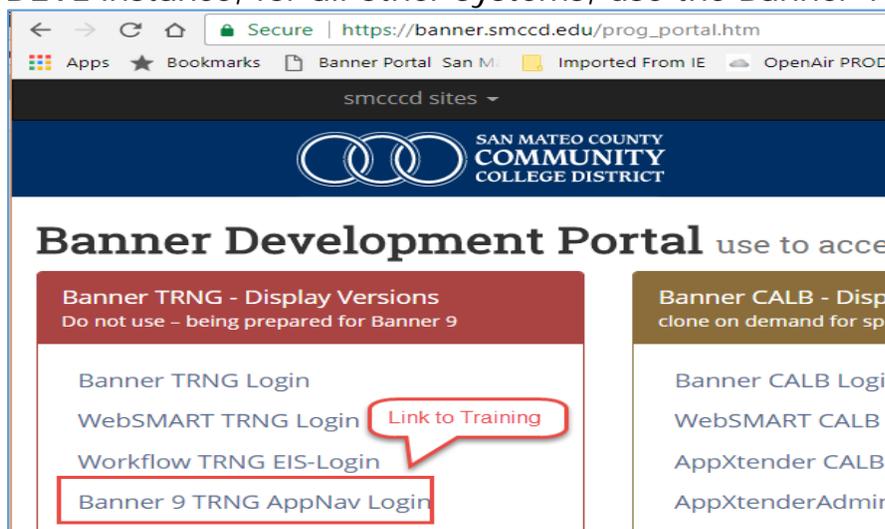
3. **Sign in** uses your employee email (AD) username and password ([username@smccd.edu](mailto:username@smccd.edu)).

Use your SMCCD **email username** and **password** to login.  
Example: **jdoe172** — do not include '@smccd.edu'.

Remember me on this computer

[Forgot Password?](#)

**Note: For training, go to the Banner Development Portal, [http://banner.smccd.edu/prog\\_portal.htm](http://banner.smccd.edu/prog_portal.htm). For Student system training, use the DEVL instance, for all other systems, use the Banner TRNG.**



**TRANSFORMED FORMS** are the Banner forms, redeveloped using java-based tools instead of Oracle Forms.

1. All baseline Banner 8 forms have been “transformed” into an equivalent Banner 9 “page” with the same name, description and functionality.
2. Responsive design – responds to the screen size.
3. Runs on Chrome, Internet Explorer, Firefox, and Safari. Chrome is recommended.

4. **Banner 9 Changes to Terminology**

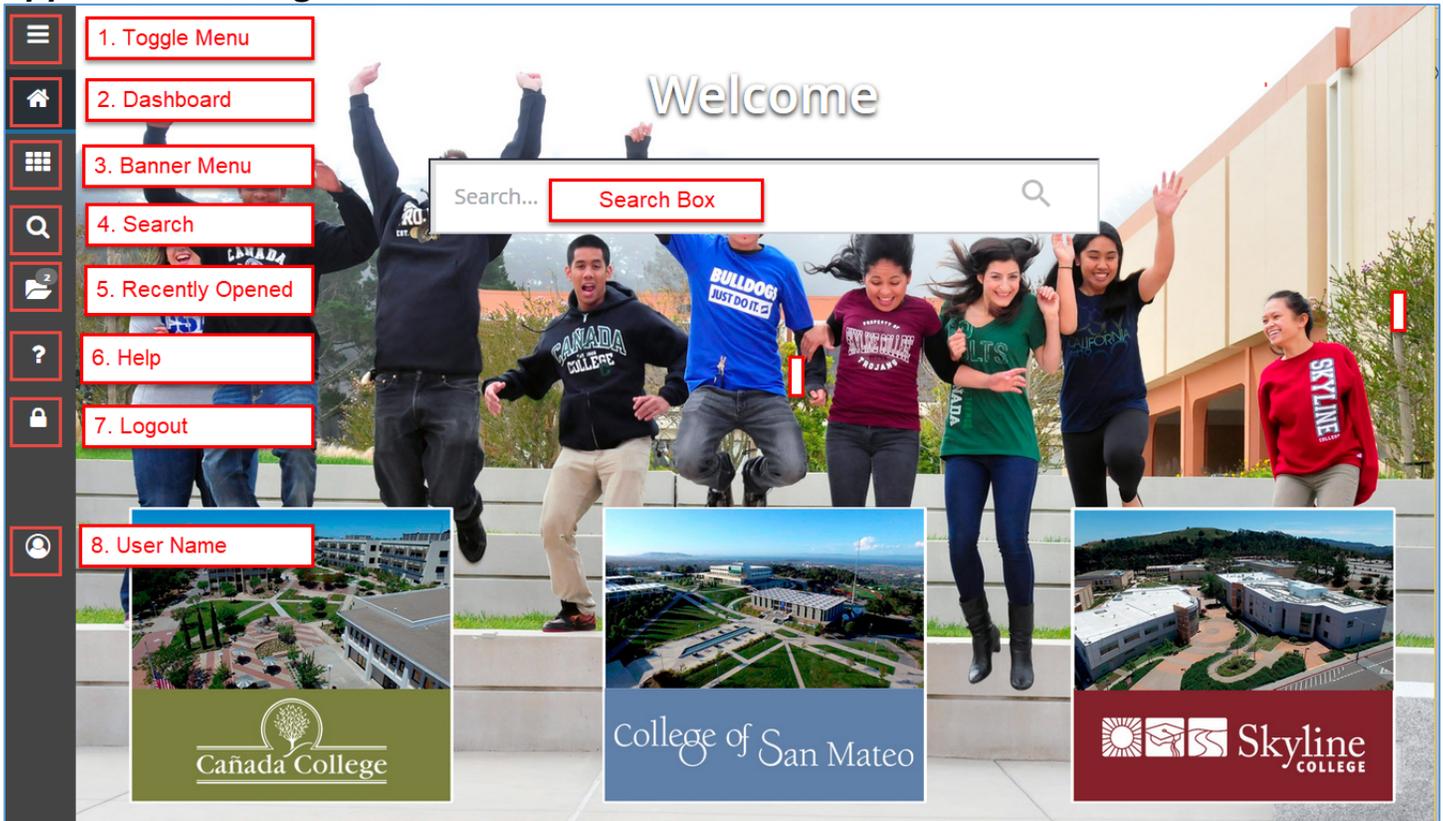
Banner 8	Banner 9
Forms	Pages
Blocks	Sections
Next Block	GO Button
Rollback	Start Over
Query	Filter

5. **Banner 9 changes to Common Shortcut Keys**

Command	Banner 8	Banner 9
Next Block	PgDn	ALT+PgDn
Previous Block	PgUp	ALT+PgUp
Record insert	CTRL+F2	F6
Record Remove	CTRL+F3	SHIFT + F6
Record Duplicate	F7	F4
Filter (Enter/Execute Query)	F9 and F10	F7
List of Values	CTRL+L	F9
Open New Form	CTRL+B	CTRL+SHIFT+Y
Save	F12	F10

B. **APPLICATION NAVIGATOR** “AppNav” is the home page that enables institutions to go between Banner 9 pages.

### **Application Navigator Dashboard**

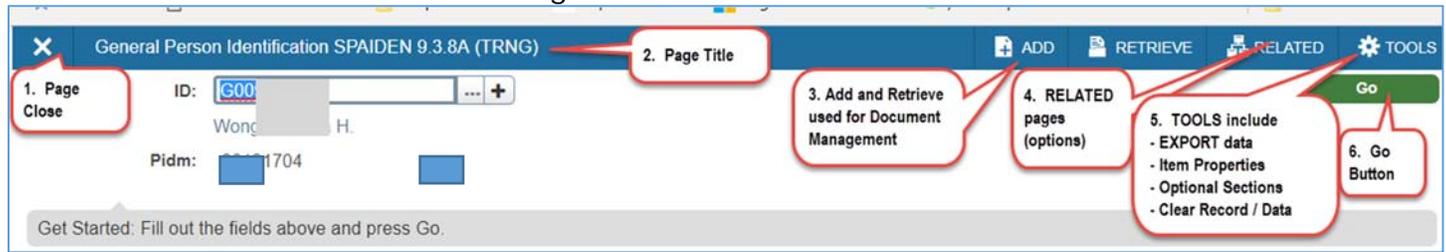


### **Banner 9 Tool Menu**

1. **Toggle Menu** expands and contracts the menu column. Banner menus open in a cascade by functional area. Find the page you are interested in opening and click. If you have set up a “My Banner” menu, that will also appear.
2. **Dashboard** (CTRL+SHIFT+X) is also Home or the Welcome page. It can be used from any page to return to the AppNav Dashboard/home page.
3. **Applications** (CTRL+M) opens the Banner menus by functional area. Find the page you are interested in opening and click.
4. **Search icon** (CTRL+SHIFT+Y) is used to search for an administrative page by entering either the Banner Acronym or the descriptive name of the page.
5. **Recently Opened icon** (CTRL+Y) displays with a count of pages after you have opened the first page. Open the list and select a page to access it.
6. **Help Icon** (CTRL+SHIFT+L) can be selected from a functional page, selecting this icon will open the help information. Help is not available from the Home Page.
7. **Sign Out** (CTRL+SHIFT+F) link in the Application Navigation Toolbar will exit you from your Banner portal applications.
8. **Banner User Name** displays name of the person logged into this account.

**Search Box on the “Welcome Page”** lets you enter either the descriptive name of the page or the Banner acronym for the page.

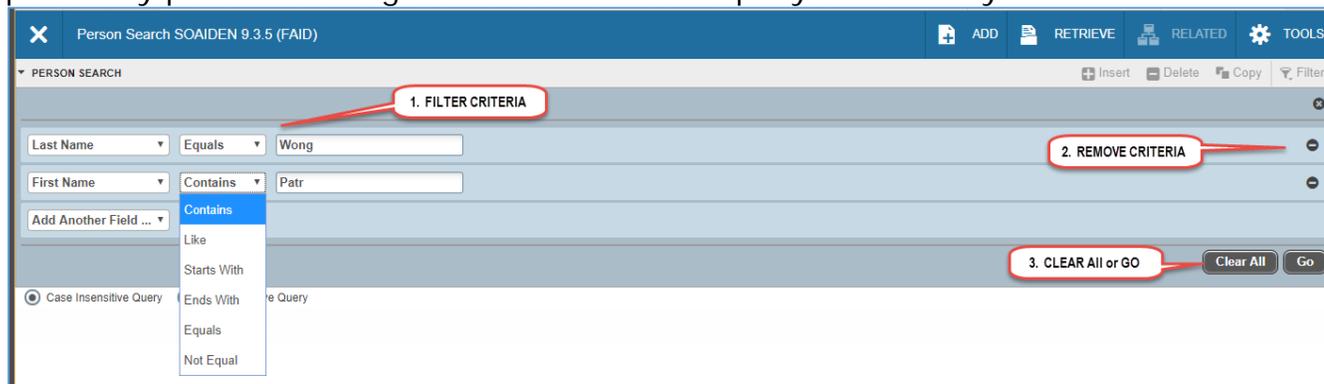
**PAGE HEADER** contains the following items:



1. **Page close** (CTRL+Q) icon.
2. **Page title**
3. **ADD** (ALT+A) and **RETRIEVE** (ALT+R) icons are used with Banner Document Management.
4. **RELATED** (ALT+SHIFT+R) button displays a list of pages that can be accessed from this page like the Options Menu in Banner 8.
5. **TOOLS** (ALT+SHIFT+T) button includes refresh, export, print, clear data, item properties, display ID image, and other options controlled by the page.
  - a. **Refresh** (F5)
  - b. **Export** (SHIFT+F1)
  - c. **Print** (CTRL+P)
  - d. **Clear Record** (SHIFT+F4)
  - e. **Clear Data** (SHIFT+F5)
6. **GO** (Alt+PgDn) to access the body of the page, populate the key block data and then click **Go**.

Note: Workflow Release and Submit buttons also display in the page header.

**FILTERS** (F7) provide the ability to search for specific records by querying on data element, previously provided through search and execute query functionality.

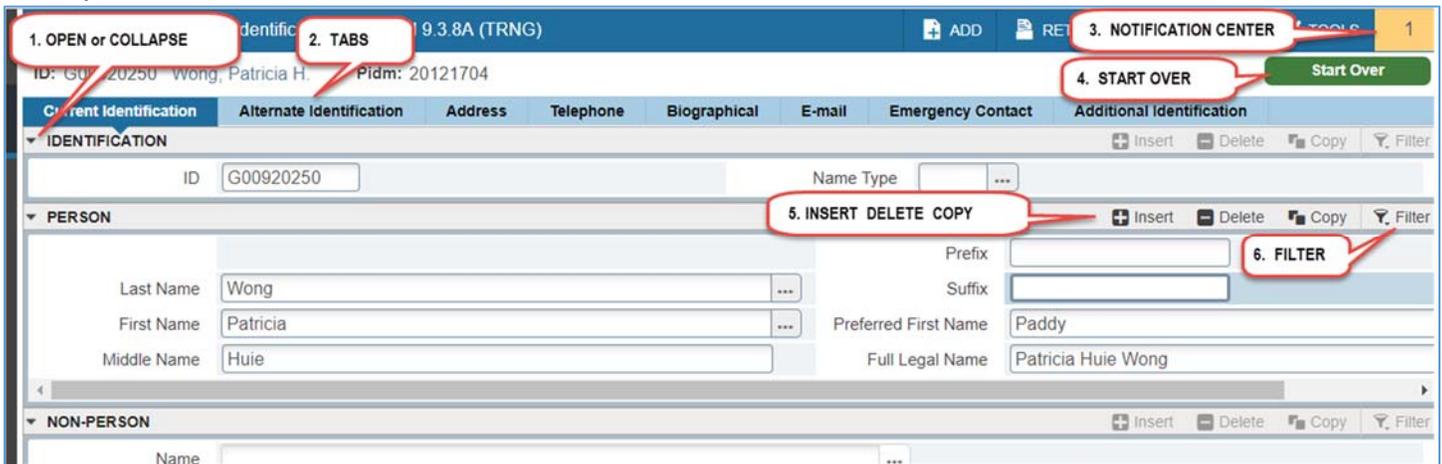


1. **Filter Criteria** provides the ability to select based upon field, function, and criteria.
2. **Remove** button are used to remove a single criteria record.
3. **Clear all** (F7) to clear results and return to filter or **GO** (F8) to execute query.
4. **Basic versus Advanced Filtering** – New functionality with the October upgrade:
  - a. Basic Filtering is the default and includes frequently-used fields with “Equal” as the function.
  - b. Advanced filtering includes all of the filter fields and criteria options.

Other buttons include:

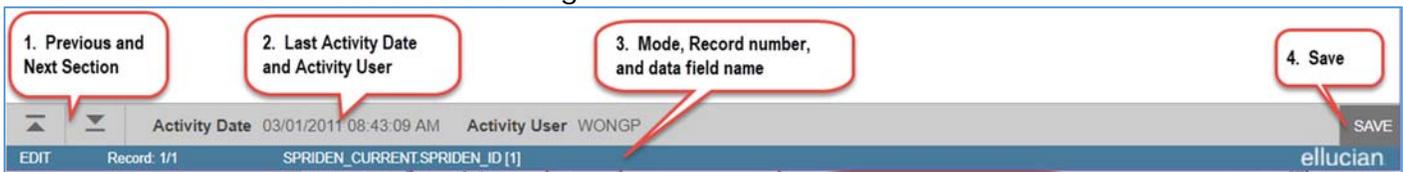
1. **CANCEL** (CTRL+Q)
2. **SELECT** (ALT+S)

**SECTIONS** of the form will display after the key data has been entered and the **GO** button has been pressed.



1. **Open or Collapse** a section using the arrow on the far left side of the section header.
2. **Tabs** (CTRL+SHIFT+1, CTRL+SHIFT+2, etc.. using number represents the tab sequence) are available on some pages to access sections of grouped information.
3. **Notification Center** displays messages including errors.
4. **Start Over** (Alt+PgUp) returns to the key block.
5. **Insert-Delete-Copy record icons** for the following actions:
  - a. **Insert** (F6) Use this to insert records in the section.
  - b. **Delete** (SHIFT+F6) Use this to delete records in the section.
  - c. **Copy**. (F3 or F4 to duplicate selected record in the section.)
6. **Filtering (F7)** is used to limit and identify records based upon search criteria. See the section below on Filtering.

**PAGE FOOTER** includes the following:



3. **NEXT** (ALT+PgDn) and **PREVIOUS** (ALT+PgUp) sections move up and down between sections and tabs.
4. Last Activity Date and User (if information is collected on the page/form.)
5. **SAVE** (F10) button
6. Additional information including:
  - a. **MODE** identifies edit (update) versus query mode.
  - b. **Record Number** identifies record number and total records.
  - c. **Data Field Name** identifies the Banner table and data field.

## DATA in GRID MODE

Institution: 015235 CCC Chabot College Program: Default Institutu

3. Sort by Column Heading

TRANSFERRING COURSE

Group	Primary	Term	Level	Subject	Course	Status	Title
20	<input checked="" type="checkbox"/>	197908	01	ENGLI	1B	AC	Comp & Reading
20	<input type="checkbox"/>	197908	01	ENGLI	1A	AC	Comp & Reading
80	<input checked="" type="checkbox"/>	200908	01	ESYS	60	AC	Electronic Systems Analysis
80	<input type="checkbox"/>	200908	01	ESYS	54	AC	Analog Circuit and Semi Device
H0	<input checked="" type="checkbox"/>	200608	01	HIST	8	AC	United States History Since Re
H0	<input type="checkbox"/>	200608	01	HIS	7	AC	United States History Until Re
	<input type="checkbox"/>	197508	01	TRENGLI	1A	AC	Comp & Reading
	<input type="checkbox"/>	197908	01	BUSIN	77A	AC	Shorthand I
	<input type="checkbox"/>	197908	01	BUSIN	77B	AC	Shorthand II
	<input type="checkbox"/>	197908	01	ENGLI		AC	Comp & Reading

1. Page Count and Records per Page

2. Total number of Records per Page

Record 1 of 4088

Protect from Import  Select All  Deselect All  None

Course Details Course Description

Equivalent Exists	Credits Low	Credits High	Minimum Grade	Catalog	Protect from Import
<input checked="" type="checkbox"/>	4.000	4.000			<input type="checkbox"/>
<input type="checkbox"/>	3.000	3.000			<input type="checkbox"/>
<input checked="" type="checkbox"/>	2.000	2.000			<input type="checkbox"/>
<input checked="" type="checkbox"/>	2.000	2.000			<input type="checkbox"/>

SAVE

1. **Page Count** indicates the number of total pages. **Records per Page** manage the number of records displayed.
2. **Record Count** indicates the record highlighted as a count within the total number of records.
3. **Sort Order** – in Grid mode, click on header name.
4. Record data can continue to a section below or require scrolling to the right.

## OTHER BASIC NAVIGATION HINTS

1. Functionally, things are the same. The sooner you begin using it, the more comfortable you become.
2. Link to set up your Password Manager reset: <https://adselfservice.smccd.edu>. You must register before you need it.
3. Asterisk "\*" indicates a required field.
4. Dates can be identified by calendar pop-up. "T" can also be entered to default in today's date.
5. Name search can be performed by tabbing through the blank ID field. A box will pop up where a name can be entered in last, first name format. If not found, other options are presented.
6. "..." next to a field will bring up the drop-down list of values.
7. Multiple Records are identified by the record count in page footer.
8.  **Single** and **Multiple** record icons will show before the "Insert" icon on administrative pages that display in grid mode with multiple records or a single record at a time.
9. Quickflows are executed from the page, "GUAQFLW".
10. Banner 8 INB – Recommend opening Banner 8 forms from a separate Internet Explorer tab.

## KEYBOARD SHORTCUTS

ACTION	Banner 8	Banner 9
Choose / Submit	ENTER	ENTER
Clear record	F3	SHIFT+F4
Clear records (all in a section)		SHIFT+F5
Delete Record	CTRL+F3	SHIFT+F6
Down or Next Record	Down Arrow	Down Arrow
Duplicate selected record	F7	F4
Exit Current Page or Exit Search	CTRL+Q	CTRL+Q
Export Data		SHIFT+F1
Filtering (enter/execute query)	F9, F10	F7
First Record		CTRL+Home
Help		CTRL+SHIFT+L
Insert/Create Record	CTRL+F2	F6
Last Record		CTRL+End
Lookup or List of Values (LOV)	CTRL+L	F9
Next Field or Item	Tab	Tab
Next Page Down (where multiple records per page)	F8	Page Down
Next Section	Page Down	ALT+Page Down
Open Menu Directly		CTRL+M
Open Related Menu		ALT+SHIFT+R
Open Tools Menu		ALT+SHIFT+T
1 <sup>st</sup> Tab 2 <sup>nd</sup> Tab and so on		CTRL+SHIFT+1 CTRL+SHIFT+2
Previous Field or Item	SHIFT+TAB or F6	SHIFT + TAB
Previous Section	Page Up	ALT+Page Up
Print	CTRL+P	CTRL+P
Save	F12	F10
Select record on a Called Page	double-click	double-click or ALT+S
Start Over or Rollback	F5	F5
Toggle Multi/Single Records View		CTRL+G
Up/Previous record	Up Arrow	Up Arrow
Application Navigator		
AppNav - Access Help		CTRL+SHIFT+L
AppNav - Access Menu		CTRL+M
AppNav - Recently Opened pages		SHIFT+Y
AppNav – Search	CTRL+B	CTRL+SHIFT+Y
AppNav - Sign Out		CTRL+SHIFT+F
Banner Document Management		
Add BDM Documents		ALT+A
Retrieve BDM Documents		ALT+R