

Montgomery College

BANNER 9

General Instruction Guide Version 1.0



Office of Information Technology
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Introduction

Welcome to Banner 9!

The instructions within this guide are intended to assist you navigate through the new functionality found in Banner 9. The guide includes key terminology changes from Banner 8 to Banner 9, keyboard shortcuts, and basic navigation training.

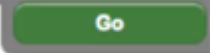







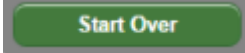
Banner 9 has intuitive navigation that works on all current browsers and eliminates the need for a Java client on your computer. And, it's mobile friendly! Banner 9 retains the core business rules and functionality utilized in Banner 8.

For more information about the Banner 9 project, including FAQs, please visit the project webpage at <https://info.montgomerycollege.edu/offices/information-technology/projects-news-committees.html#banner>

For specific questions about Banner Navigation, please contact the IT Service Desk:

- by clicking on the IT Service Desk icon found on your desktop
- by email at itservicedesk@montgomerycollege.edu
- by web chat at <https://www.montgomerycollege.edu/oit>
- by phone at 240-567-7222

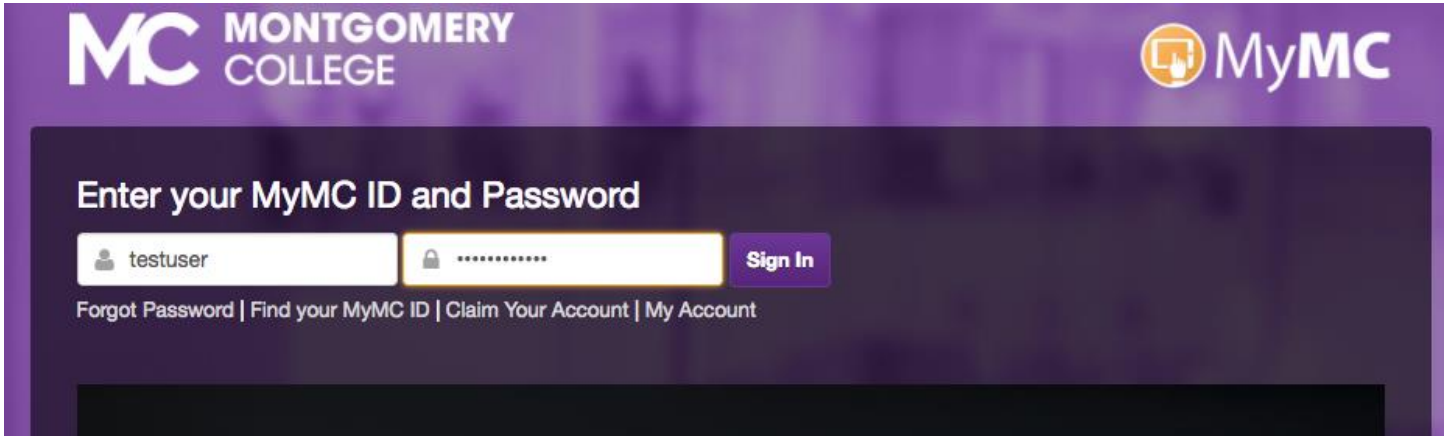
Terminology Changes

Key Terminology Changes	
Banner 8	Banner 9
Block	Section
Forms	Pages
-	Go (new button in Banner 9) 
Icon	Buttons
Next Block 	Previous section/Next section 
Options <u>Options</u>	Tools  TOOLS and Related  RELATED
Query 	Filter 
Record Remove	Delete
Rollback 	Start Over (Button) 

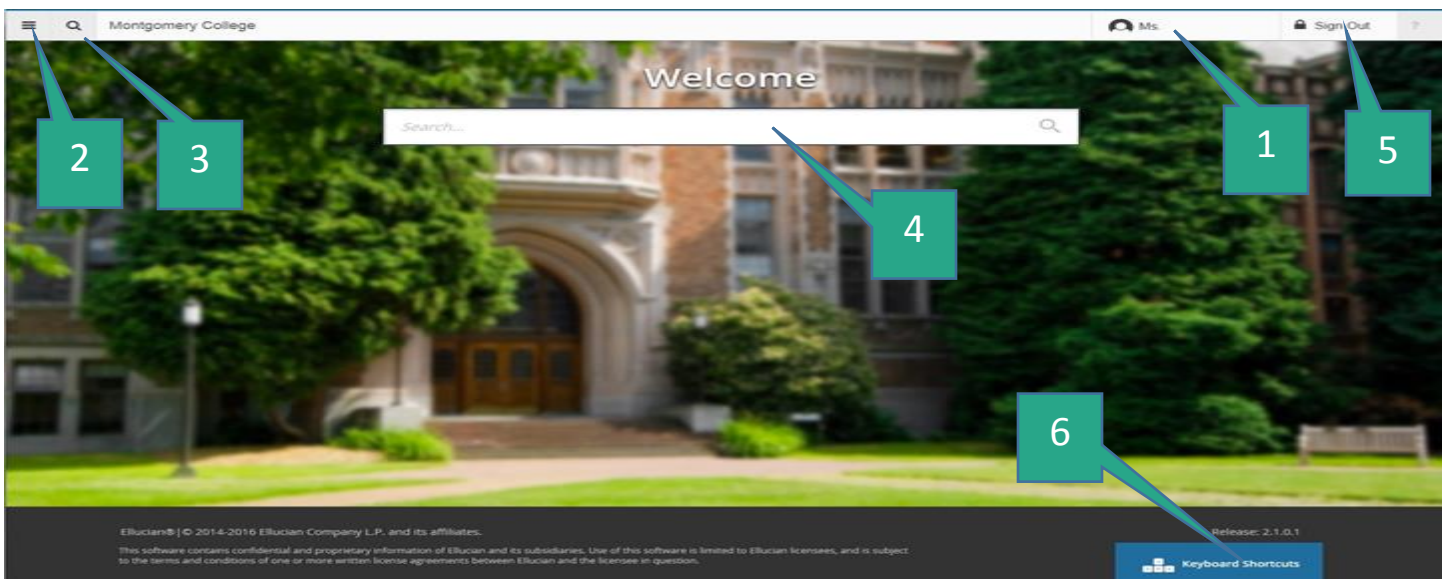
Getting started with Banner 9

1. Banner 9 Welcome Screen/Application Navigator

- Open your preferred web browser. MC recommends Firefox and Google Chrome.
- Enter your MyMC ID and password, click **Sign In** to log into your Banner 9 account.



- After you are logged in to Banner 9, the Banner Welcome Screen/Application Navigator (General Menu in Banner 8) will be displayed.
 1. **User name** is located at the upper right corner of the application.
 2. **Menu Icon** is located at the upper left corner of the application.
 3. **Search Icon** is located at the upper left next to Menu Icon of the application.
 4. **Search field** is located at the center of the screen.
 5. **Sign Out** is located at the upper right corner, next to user name of the application.
 6. **Keyboard Shortcuts** is located at the button right.



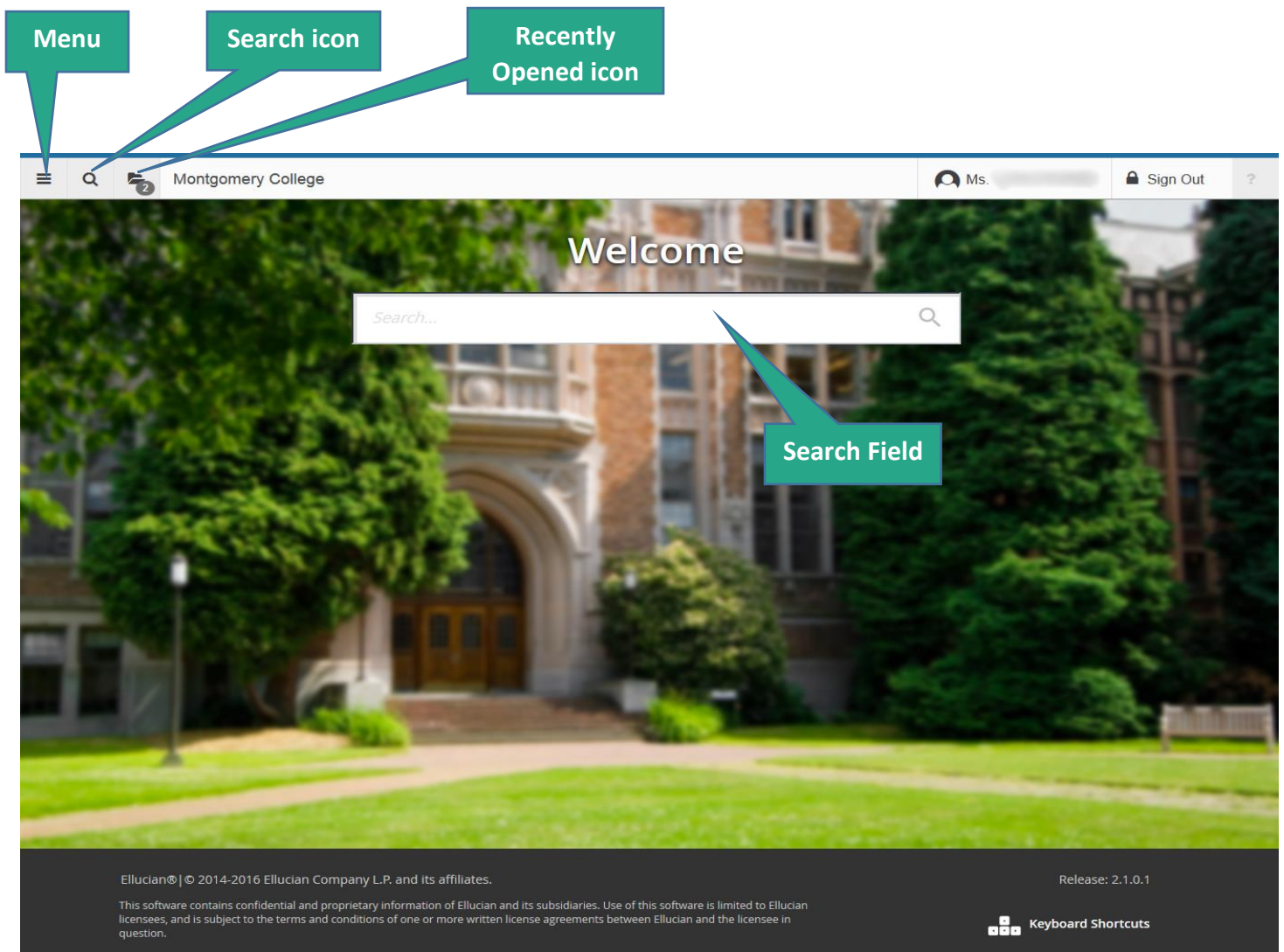
Note: The Banner 9 single sign on will provide access to Banner Administrative application and Self-Services applications.

From the Welcome Screen/Application Navigator page you can access Banner 9 pages (Forms in Banner 8) in four ways.

- **Menu Icon:** Click on this icon to open the Banner Menu. Locate the page you need. Select the desired entry and click Enter.
- **Search Icon:** Click on this icon to open the Search window. You can then enter either the descriptive name of the page or the Banner acronym for the page.
- **Recently Opened Icon** is located in the upper left, just to the right of the Search icon. It is displayed with a count of pages accessed since logging in. You also can open the list and select a page to access it again. Close forms when finished with them.
- **Search Field:** 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.

Note: If you click on “Montgomery College” at the top, it brings you back to the Welcome Screen/Application Navigator.

Note: Do not use the browser’s back or forward navigation buttons.

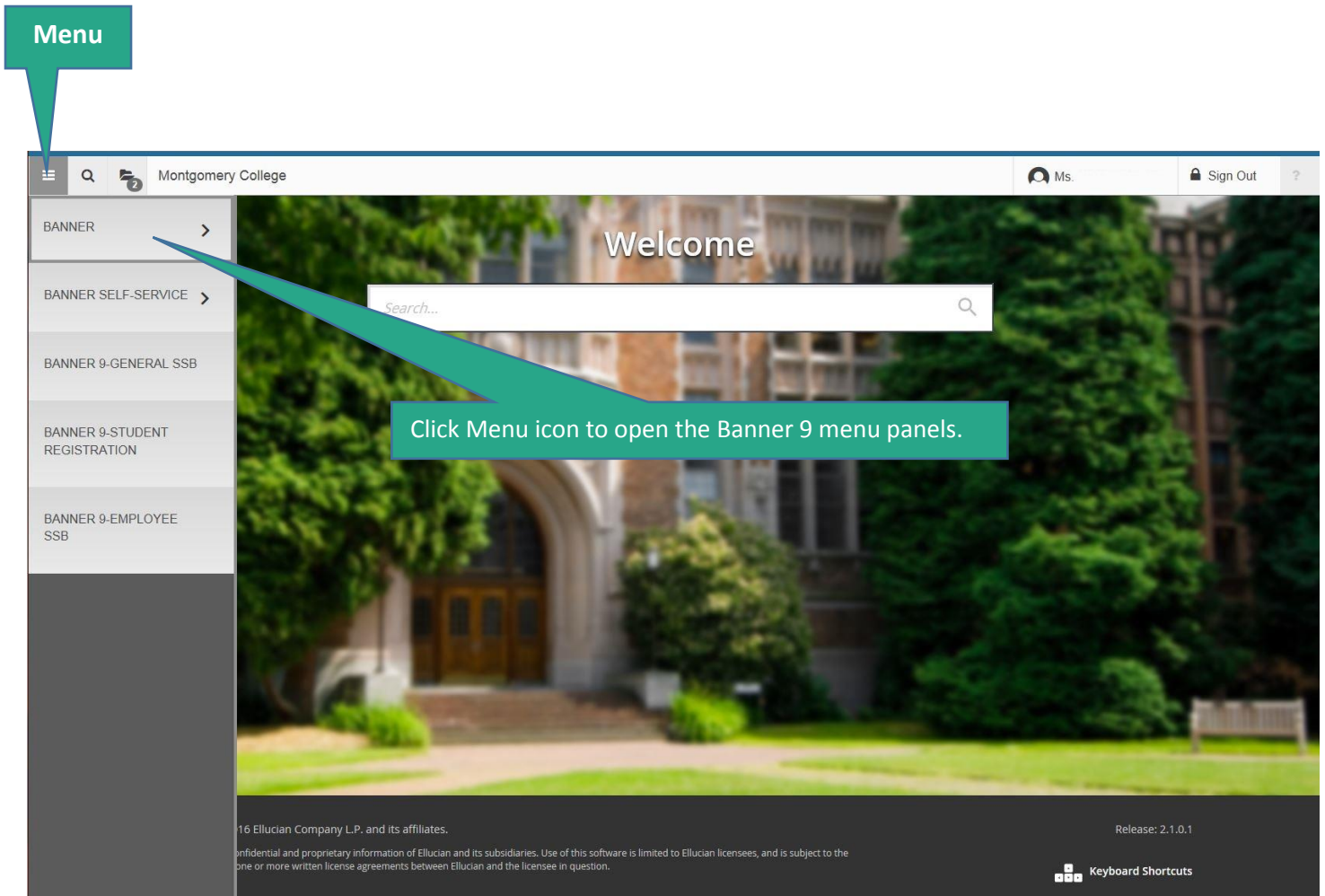


2. Menu Icon

Click the **Menu Icon** to open the Banner 9 menu.

- BANNER
- BANNER SELF-SERVICES
- BANNER 9-GENERAL SSB
- BANNER 9-STUDENT REGISTRATION
- BANNER 9-EMPLOYEE SSB

Note: Depending on your access, you may have different applications appear on the Menu.



Montgomery College

Ms. [User Name] Sign Out

Welcome

Search...

- Student (*STUDENT) >
- Advancement (*ALUMNI) >
- Finance System Menu (*FINANCE) >
- Human Resources (*HRS) >
- Financial Aid (*RESOURCE) >
- General (*GENERAL) >

Callout Box:

- Click the Right Arrow bar to expand the menu tree to locate a specific page.
- Continue to use the Arrow to expand menu levels.
- Locate the page you need, select the entry and click enter.
- Use the Up/Down bar to locate page.

Job Submission (*GENJOB) >

- Letter Generation (*GENLETTER) >
- General International Management (*GENINTL) >
- System Functions/Administration (*GENSYS) >
- Event Management (*GENEVENT) >
- General Web Management (*GENWEB) >

Job Submission (*G... >

- Process Submission Controls (GJAPCTL)
- Process Maintenance (GJAJOB5)
- Parameter Definitions (GJAPDEF)
- Parameter Value Validations (GJAPVAL)
- Default Parameter Value Validations (GJAPDFT)
- Job Parameter Set Rules (GJRJPRM)
- Process Results (GJARSLT)
- Printer Validation (GTVPRNT)
- Saved Output Review (GJIREV0)
- Delete Saved Output (GJIREV0)

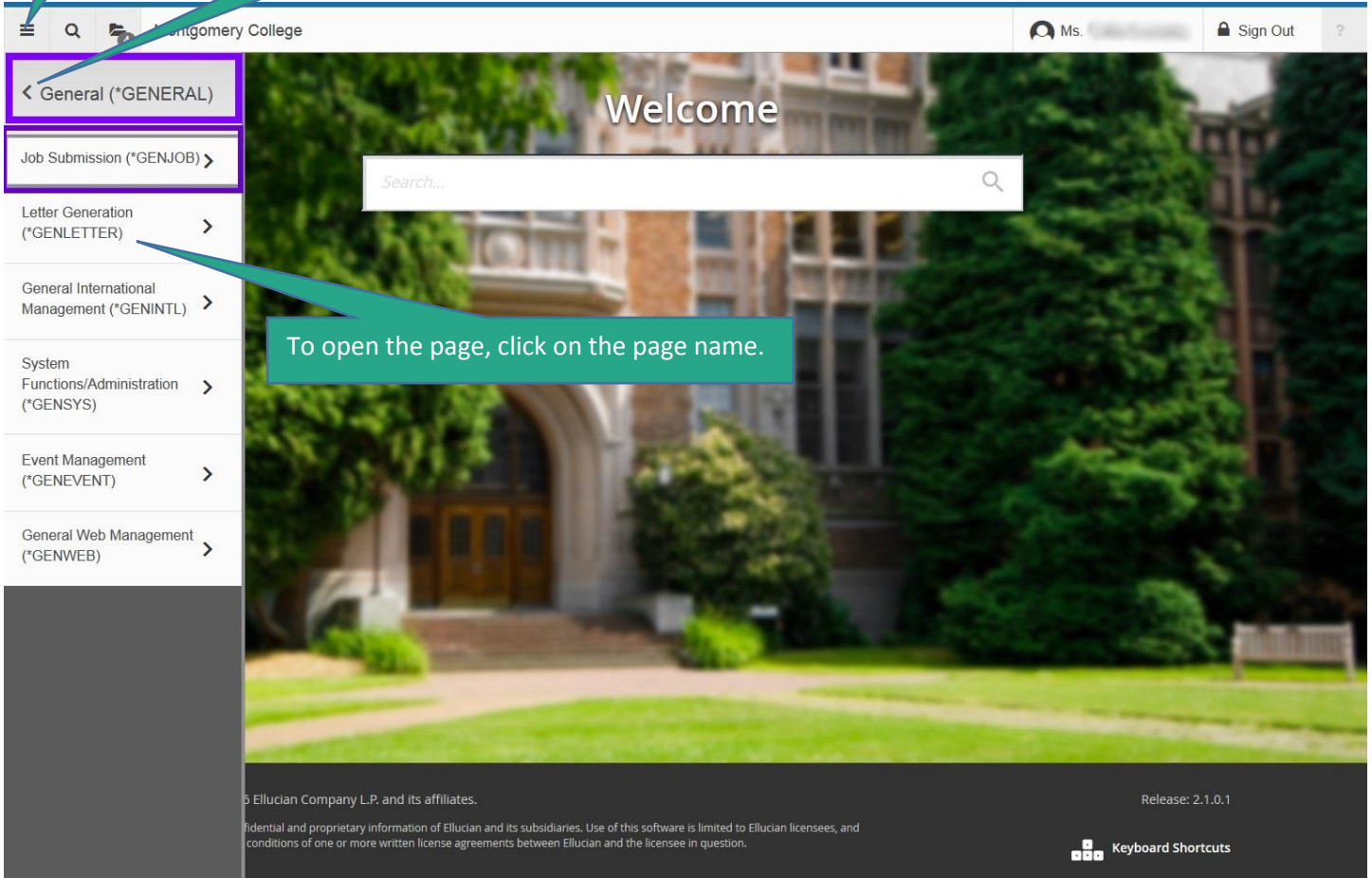
Release: 2.1.0.1

Keyboard Shortcuts

To close the Menu completely, click the Menu icon again.

To collapse the tree, click the Left Arrow.

To open the page, click on the page name.



3. Search Icon

The screenshot displays the top navigation bar of the Montgomery College Banner 9 system. On the left, there is a search icon (magnifying glass) next to a hamburger menu icon. A green callout box labeled "Search Icon" points to this magnifying glass icon. Below the navigation bar, a search panel is visible, containing a search input field with the placeholder text "Search" and a search icon. A larger green callout box points to this search panel and contains the following text: "In the search panel, enter partial page name, page code (seven letter code) or key word(s). Entering a key word will return all pages containing that word." The background of the page features a large image of a college building with a prominent arched entrance. At the bottom of the page, there is a footer area with small text: "© 2016 Ellucian Company L.P. and its affiliates. Release: 2.1.0.1" and "Confidential and proprietary information of Ellucian and its subsidiaries. Use of this software is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and the licensee in question." A "Keyboard Shortcuts" icon is also present in the footer.

To close the Search panel, click the search icon.

The screenshot shows the Banner 9 search interface. At the top, there is a search bar with the text "Montgomery College" and a search icon. To the right of the search bar, there is a user profile icon labeled "Ms." and a "Sign Out" button. Below the search bar, a search panel is open, displaying "33 results". The search term "Fin" is entered in the search bar. The search results list includes:

- Parameter Definitions (GJAPDEF)
- QuickFlow Definitions (GUAQUIK)
- Building Definition (SLABLDG)
- Room Definition (SLARDEF)
- Program Definition Rules (SMAPRLE)
- Schedule Cross List Definition (SSAXLST)
- Detail Code Control Form - Finance (TFADETC)
- Miscellaneous Transaction Form - Finance (TFAMISC)
- Financial (*FINANCE) >
- Accounts Receivable (*FINAR) >
- Grant Billing Accounts

Callouts in the image provide instructions: "To close the Search panel, click the search icon." points to the search icon in the top bar. "For example, type 'Fin' and the search results will display below. Click on the page to open it." points to the search term "Fin" in the search bar. "Use the scroll bar to review the entire panel." points to the scroll bar on the right side of the search results list.

4. Recently Opened Icon

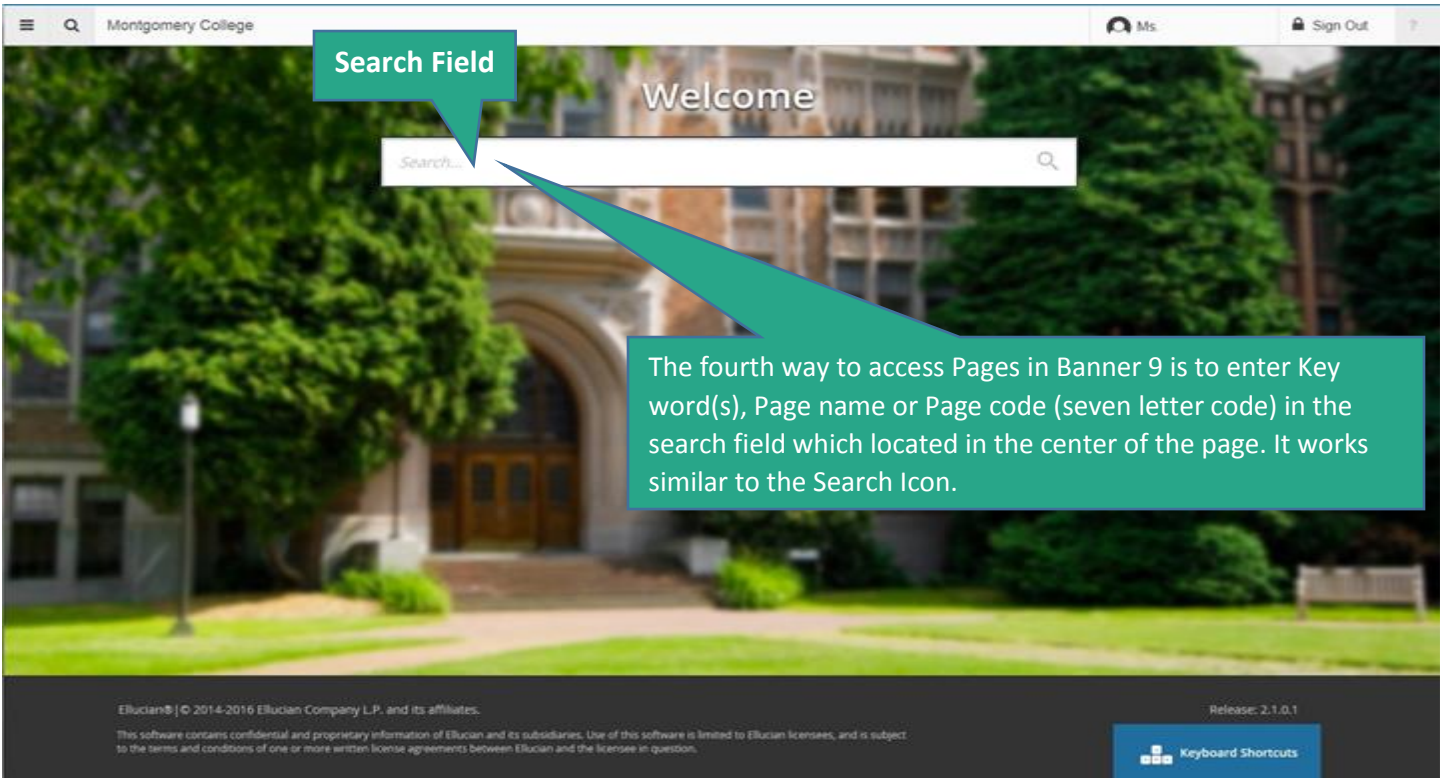
Recently Opened Icon

The Recent Opened icon indicates the number of pages accessed with an account opened after the first page.

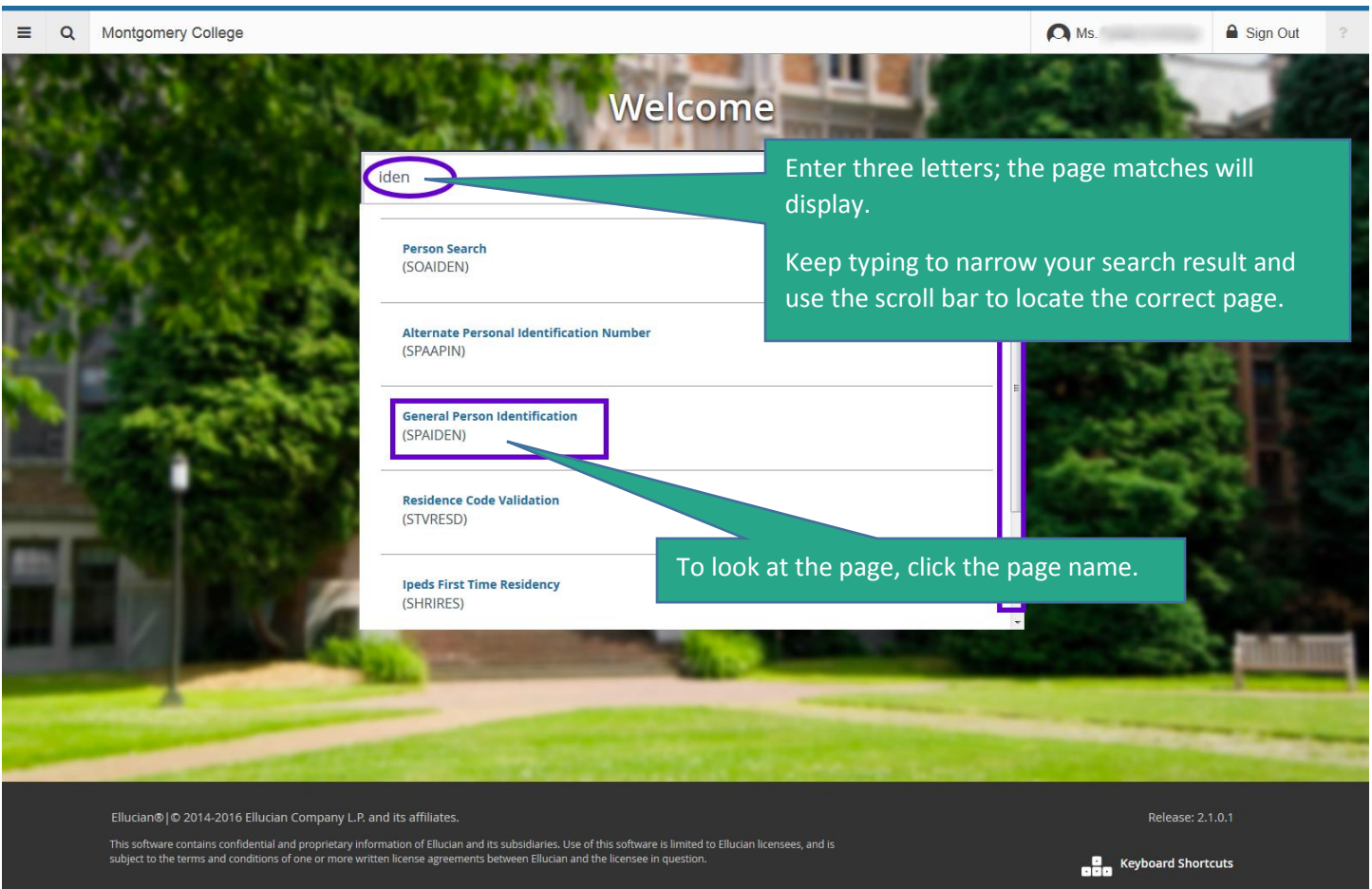
Click the Recent Opened icon to see a list of pages, and click the icon again to close.

Click on the listed pages to open them.

5. Search Field



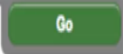
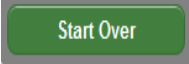
The fourth way to access Pages in Banner 9 is to enter Key word(s), Page name or Page code (seven letter code) in the search field which located in the center of the page. It works similar to the Search Icon.



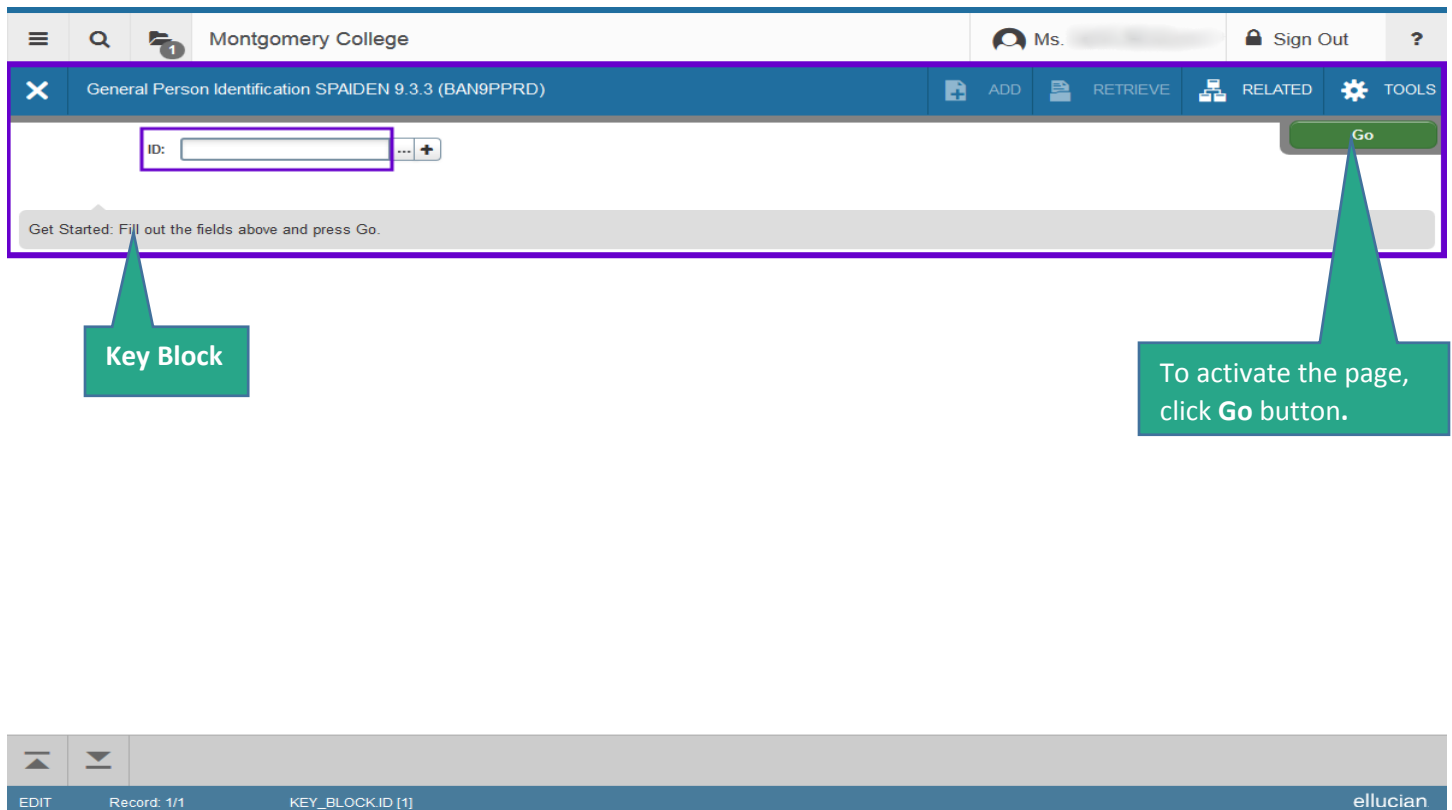
6. Basic Navigation

After you open a Page (Form in Banner 8), you will notice that the page looks different, but the page layout, icons, buttons and overall functionalities have remained the same.

Key Block: The key block opens initially, and fields and icons within the key blocks are all the same.

- Enter a search item in the field, after entering the required value in the key block, click **Go**  to activate the page.
- Click **Person Search**, **Non-Person Search**, or **Alternate ID Search** on **Option List**, and enter a search item.
- The key block collapses after you click **Go**, but the information is still viewable.
- Click **Start Over**  to rollback.

Note: If you accidentally hit the back button on your browser, you will land on the MyMC sign-on page. Do not use the browser's back or forward navigation buttons.



The screenshot displays the Banner 9 user interface. At the top, the header shows 'Montgomery College' and a user profile for 'Ms. [Name]'. Below the header, a blue navigation bar contains the title 'General Person Identification SPAIDEN 9.3.3 (BAN9PPRD)' and several action buttons: 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The main content area features a search form with an 'ID:' label, a text input field, and a 'Go' button. A purple box highlights the search form area, which is labeled 'Key Block' with a callout. Another callout points to the 'Go' button, stating 'To activate the page, click Go button.' Below the search form, a grey box contains the instruction: 'Get Started: Fill out the fields above and press Go.' At the bottom of the page, a footer bar includes navigation arrows, the text 'EDIT Record: 1/1 KEY_BLOCK.ID [1]', and the 'ellucian' logo.

Banner 9 General Instruction Guide

The screenshot shows the top navigation bar of Banner 9. The search bar contains the text "ID: M:12345678" and "Doe, Jane". A green callout box points to the search bar with the text "Enter a search item." Another green callout box points to the "Go" button with the text "Click Go button to activate the page." Below the search bar, a grey bar contains the text "Get Started: Fill out the fields above and click Go."

Montgomery College

Ms

Sign Out

General Person Identification SPAIDEN 9.3.3 (BAN9PPRD)

ADD RETRIEVE RELATED TOOLS

ID: M:12345678 ... + Doe, Jane

Go

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

Enter a search item.

Click Go button to activate the page.

The screenshot shows the record view for the person identified by ID M:12345678. The "Start Over" button is highlighted with a green callout box containing the text "Click Start Over button to rollback the page to re-enter the data." The record details are organized into sections: IDENTIFICATION, PERSON, and NON-PERSON. The PERSON section includes fields for Last Name (Doe), First Name (Jane), Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name. The NON-PERSON section includes a Name field. The bottom of the screen shows the activity date and user information.

EDIT Record: 1/1 KEY_BLOCK.GENERATE_BTN [1] ellucian

Montgomery College

Ms

Sign Out

General Person Identification SPAIDEN 9.3.3 (BAN9PPRD)

ADD RETRIEVE RELATED TOOLS

ID: M:12345678 Doe, Jane

Start Over

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

IDENTIFICATION

Insert Delete Copy Filter

ID M:12345678 Name Type

PERSON

Last Name Doe Prefix

First Name Jane Suffix

Middle Name Preferred First Name

Full Legal Name

NON-PERSON

Insert Delete Copy Filter

Name

Activity Date 04/09/2007 04:10:04 PM Activity User

SAVE

EDIT Record: 1/1 SPRIDEN_CURRENT.SPRIDEN_ID [1] ellucian

Click Start Over button to rollback the page to re-enter the data.

Banner 9 General Instruction Guide

SAVE Icon is located at the bottom of the page. It is the major difference between Banner 8 and Banner 9.

Montgomery College

Ms. [User Name] Sign Out

General Person Identification SPAIDEN 9.3.3 (BAN9PPRD)

ADD RETRIEVE RELATED TOOLS

ID: M12345678 Doe, Jane Start Over

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

IDENTIFICATION

ID: M12345678 Name Type: ...

PERSON

Last Name: Doe Prefix: Ms.
First Name: Jane Suffix: ...
Middle Name: Preferred First Name: ...
Full Legal Name: ...

NON-PERSON

Name: ...

ID AND NAME SOURCE

Last Update: ...
Origin: ...
Original Creation: ...
User: ... Create Date: 02/09/2007

Activity Date: 04/09/2007 04:10:04 PM Activity User: ...

EDIT Record: 1/1 SPRIDEN_CURRENT:SPRIDEN_ID [1] ellucian

SAVE

Click the **"X"** on top to close the page.

Montgomery College

Ms. [User Name] Sign Out

General Person Identification SPAIDEN 9.3.3 (BAN9PPRD)

ADD RETRIEVE RELATED TOOLS

ID: M12345678 Doe, Jane Start Over

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

IDENTIFICATION

ID: M12345678 Name Type: ...

PERSON

Last Name: Doe Prefix: Ms.
First Name: Jane Suffix: ...
Middle Name: Preferred First Name: ...
Full Legal Name: ...

NON-PERSON

Name: ...

ID AND NAME SOURCE

Last Update: ...
Origin: SPAIDEN
Original Creation: ...
User: ... Create Date: 02/09/2007

Activity Date: 04/09/2007 04:10:04 PM Activity User: ...

EDIT Record: 1/1 SPRIDEN_CURRENT:SPRIDEN_ID [1] ellucian

SAVE

Banner 9 General Instruction Guide

Montgomery College

Ms. Sign Out

General Person Identification SPAIDEN 9.3.3 (BAN9PPRD)

ADD RETRIEVE RELATED TOOLS

ID: [] +

Go

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

Click Search Button to open the Option List below.

+ Button is how you open Common Matching to add a new person.

Option List

- [Person Search](#)
- [Non-Person Search](#)
- [Alternate ID Search](#)

Cancel

EDIT Record: 1/1 KEY_BLOCK.ID [1] ellucian 100%

Click **“Person Search”** and enter a search term.

Person Search SOAIDEN 9.3.5 (BAN9PPRD)

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

Person Search SOAIDEN 9.3.5 (BAN9PPRD)

ADD RETRIEVE RELATED TOOLS 1

PERSON SEARCH

Enter a query; press F8 to execute.

Add Another Field ...

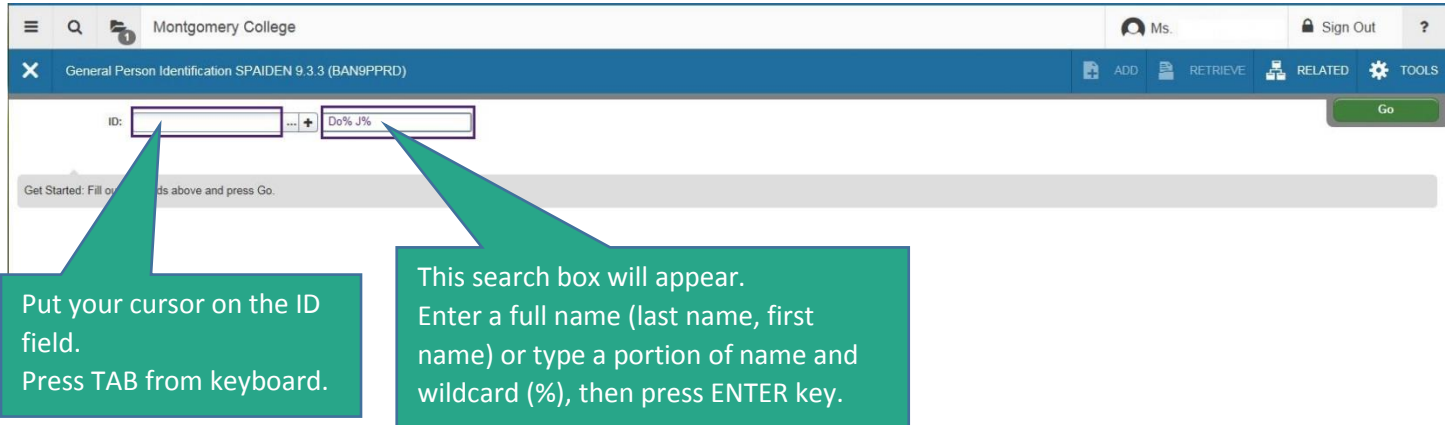
- ID
- Last Name
- First Name
- Middle Name
- Change Indicator
- Name Type

Clear All Go

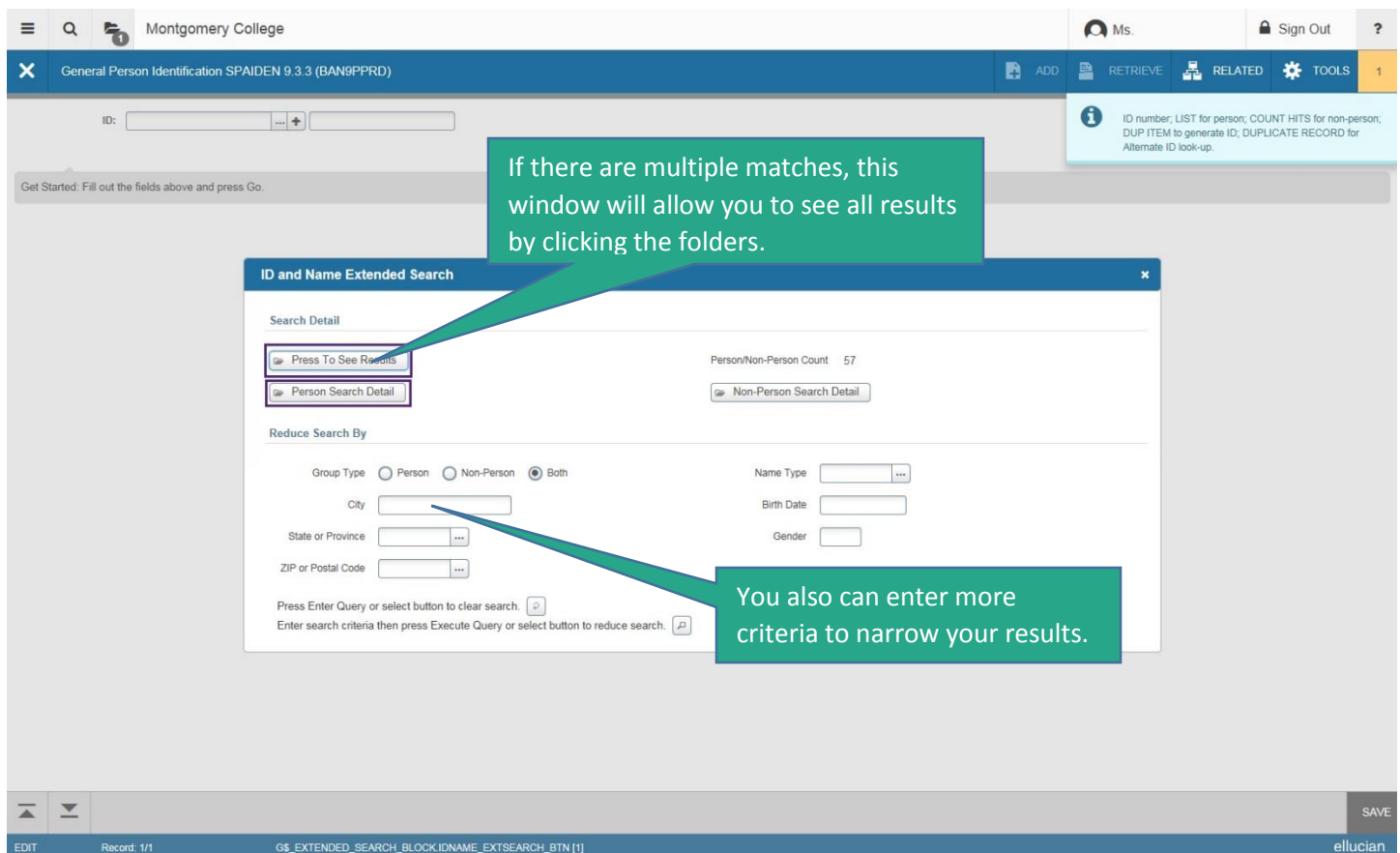
Case Sensitive Query

Banner 9 General Instruction Guide

There is an alternative way to do a search. You can press TAB when a cursor is in the ID field, it will make a second search box to the right. You can enter a full name (last, first) and press ENTER key on the keyboard (NOT the "GO" button), or type a portion of name and wildcard (%), then press ENTER key. If it's a single match, the ID will be auto-filled in the ID field. If there are multiple matches, you will get a window that will guide you to view the matches, or you can enter additional criteria.



The screenshot shows the Banner 9 search interface. The top navigation bar includes the Montgomery College logo, a search icon, and a user profile with the name 'Ms.' and a 'Sign Out' button. Below the navigation bar is a blue header with the text 'General Person Identification SPAIDEN 9.3.3 (BAN9PPRD)' and buttons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The main search area has an 'ID:' label followed by an empty text input field and a dropdown arrow. To the right of the ID field is a search box containing the text 'Do% J%'. A green callout box points to the ID field with the text: 'Put your cursor on the ID field. Press TAB from keyboard.' Another green callout box points to the search box with the text: 'This search box will appear. Enter a full name (last name, first name) or type a portion of name and wildcard (%), then press ENTER key.' Below the search area is a grey bar with the text 'Get Started: Fill out the fields above and press Go.' and a green 'Go' button.



The screenshot shows the Banner 9 search interface with the 'ID and Name Extended Search' window open. The window has a blue header with the text 'ID and Name Extended Search' and a close button. Below the header is a 'Search Detail' section with a 'Press To See Results' button and a 'Person Search Detail' button. To the right of the 'Search Detail' section is a 'Person/Non-Person Count' of 57 and a 'Non-Person Search Detail' button. Below the 'Search Detail' section is a 'Reduce Search By' section with radio buttons for 'Group Type' (Person, Non-Person, Both) and 'Name Type'. There are also input fields for 'City', 'State or Province', 'ZIP or Postal Code', 'Birth Date', and 'Gender'. A green callout box points to the 'Press To See Results' button with the text: 'If there are multiple matches, this window will allow you to see all results by clicking the folders.' Another green callout box points to the 'Reduce Search By' section with the text: 'You also can enter more criteria to narrow your results.' Below the search area is a grey bar with the text 'Get Started: Fill out the fields above and press Go.' and a green 'Go' button. At the bottom of the page is a blue footer with the text 'EDIT Record: 1/1 G\$_EXTENDED_SEARCH_BLOCK.IDNAME_EXTSEARCH_BTN [1] ellucian'.

Tabs and Sections:

- Banner 9 has **tabs** which help to organize data.
- There are **Sections** which are denoted by gray bars.
- Move between sections or tabs by clicking “**Previous section/Next section icons**”. The icons are located at the bottom of the page.
- In Banner 9, you can also expand or collapse Sections by clicking Arrows located in Section headers. This allows you to get more information that is hidden in that section.
- Simply click the Arrow again to re-open the Section.

Montgomery College

Ms. [User Name] Sign Out

General Person Identification SPAIDEN 9.3.3 (BAN9PP) ADD RETRIEVE RELATED TOOLS

ID: M:12345678 Doe, Jane Start Over

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

IDENTIFICATION + Insert - Delete Copy Filter

ID M:12345678 Name Type

PERSON + Insert - Delete Copy Filter

Sections

Last Name Doe Prefix Ms.

First Name Jane Suffix

Middle Name Preferred First Name

Full Legal Name

NON-PERSON + Insert - Delete Copy Filter

Name

ID AND NAME SOURCE + Insert - Delete Copy Filter

Last Update

Activity Date 04/09/2007 04:10:04 PM Activity User

SAVE

EDIT Record: 1/1 SPRIDEN_CURRENT:SPRIDEN_ID [1] ellucian

Previous section/Next section icons

Banner 9 General Instruction Guide

Montgomery College | Ms. [User] | Sign Out

General Person Identification SPAIDEN 9.3.3 (BAN9PPRD) | ADD | RETRIEVE | RELATED | TOOLS

ID: M:12345678 Doe, Jane Start Over

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

IDENTIFICATION | Insert | Delete | Copy | Filter

ID: M 12345678 | Name Type: [...]

PERSON | Insert | Delete | Copy | Filter

Last Name: Doe | First Name: Jane | Middle Name: [] | Prefix: Ms. | Suffix: [] | Preferred First Name: [] | Full Legal Name: []

NON-PERSON | Insert | Delete | Copy | Filter

Name: []

ID AND NAME SOURCE | Insert | Delete | Copy | Filter

Last Update

Origin: SPAIDEN

Original Creation

User: [] | Create Date: 02/09/2007

Activity Date: 04/09/2007 04:10:04 PM | Activity User: [] | SAVE

EDIT | Record: 1/1 | SPRIDEN_CURRENT.SPRIDEN_ID [1] | ellucian

Arrows expanded

Montgomery College | Ms. [User] | Sign Out

General Person Identification SPAIDEN 9.3.3 (BAN9PPRD) | ADD | RETRIEVE | RELATED | TOOLS

ID: M:12345678 Doe, Jane Start Over

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

IDENTIFICATION | Insert | Delete | Copy | Filter

PERSON | Insert | Delete | Copy | Filter

Last Name: Doe | First Name: Jane | Middle Name: [] | Prefix: Ms. | Suffix: [] | Preferred First Name: [] | Full Legal Name: []

NON-PERSON | Insert | Delete | Copy | Filter

ID AND NAME SOURCE | Insert | Delete | Copy | Filter

Activity Date: 04/09/2007 04:10:04 PM | Activity User: [] | SAVE

EDIT | Record: 1/1 | SPRIDEN_CURRENT.SPRIDEN_ID [1] | ellucian

Arrows Collapsed

Use the **Scroll bars** to navigate up/down and right/left to see more information in each section. Watch for scroll bars where you must scroll down to see there is another scroll bar to scroll across.

Use Scroll bars to navigate the page.

There are specific functions within each Section:

- **Insert, Delete, Copy, and Filter**, your cursor must be in that Section to activate the functions, otherwise the function will be grayed out. Copy in Banner 9 does the old Record Insert and Record Duplicate in one click.

Banner 9 General Instruction Guide

Montgomery College

Ms. [User Name] Sign Out

General Person Identification SPAIDEN 9.3.3 (BAN9PPRD) ADD RETRIEVE RELATED TOOLS 1

ID: M12345678 Doe, Jane Start Over

Current Identification Alternate Identification Address Telephone Biographical E-... Filter

IDENTIFICATION ID: M12345678 Name Type: ... Filter

PERSON Filter

Last Name: Doe Prefix: Ms.
First Name: Jane Suffix: ...
Middle Name: Preferred First Name: ...
Full Legal Name: ...

NON-PERSON Filter

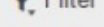
Name: ...

ID AND NAME SOURCE Filter

Last Update: ...
Origin: SPAIDEN
Original Creation: ...
User: ... Create Date: 02/09/2007

Activity Date 04/09/2007 04:10:04 PM Activity User: ... SAVE

EDIT Record: 1/1 SPRIDEN_CURRENT.PERS_LAST_NAME [1] ellucian

To query a page, select the **Filter** button  to limit the displayed results. Filtering is the new way of limiting the results shown on the form. It works similar to entering query criteria.

General Person Identification SPAIDEN 9.3.3 (BAN9PPRD) ADD RETRIEVE RELATED TOOLS 1

ID: M12345678 Doe, Jane

Current Identification Alternate Identification Address Telephone Biographical E-... Filter

ADDRESS INFORMATION Filter

Address Type: ... Starts With: A

Add Another Field ...

Contains
Contains Like
Starts With
Ends With
Equals
Not Equal
Not Equal or IS NULL
IS NULL
IS NOT NULL

Clear All Go

Banner 9 General Instruction Guide

- Use the **Record Navigation** buttons at the bottom of a section to move through the available records. You can also change the number of records displayed per page if there are more records than the default.

The screenshot shows the Banner 9 interface for 'General Person Identification SPAIDEN 9.3.3 (BAN9PPRD)'. The user is logged in as 'Ms. [redacted]' and is viewing the 'Address' tab. The form displays 'ADDRESS INFORMATION' for 'Doe, Jane' with ID 'M 12345678'. The 'From Date' is set to 10/25/2015. The 'Address Type' is 'AD' (Advancement) and the 'Sequence Number' is 1. The 'Street Line 1' is 'PO Box 12345'. The 'County' is '275 Montgomery'. The 'Nation' is blank. The 'Telephone Type' is 'AD' (Advancement). The 'Area Code' is blank. The 'Phone Number' is blank. The 'Extension' is blank. The 'Inactivate Address' checkbox is unchecked. The 'Source' is blank. The 'Delivery Point' is blank. The 'Correction Digit' is blank. The 'Carrier Route' is blank. The 'State or Province' is blank. The 'ZIP or Postal Code' is '20886-7461'. At the bottom of the form, there are navigation buttons: a left arrow, a right arrow, and a page indicator showing '2 of 6'. A green callout box labeled 'Record Navigation' points to these buttons. The bottom right corner of the form indicates 'Record 2 of 6'.

The screenshot shows the Banner 9 Activity Log header. It displays 'Activity Date 08/06/2017 11:59:59 PM' and 'Activity User [redacted]'. The 'SAVE' button is visible on the right. Below the header, the 'EDIT' button is visible, and the record is identified as 'Record: 2/6' with the path 'SPRADDR.SPRADDR_FROM_DATE [2]'. The user 'ellucian' is logged in.

Banner Header: For easier access, some functionalities have been moved to the Banner header area.

- ADD/RETRIEVE** icons in the header to use for Banner Document Management. (**Not available**)
- RELATED** icon (Some functions in Options Menu in Banner 8) gives you easy access to the pages related to data on the current page.
- TOOLS** icon (Some functions in Options Menu in Banner 8) gives you access to standard tools and actions (Print, Export, Clear Data, Exit Quickflow). The options and functions are based on the page you are viewing.

The screenshot shows the Banner 9 interface for 'General Person Identification SPAIDEN 9.3.3 (BAN9PPRD)'. The user is logged in as 'Ms. [redacted]' and is viewing the 'Identification' tab. The form displays 'IDENTIFICATION' for 'Doe, Jane' with ID 'M12345678'. The 'Name Type' is blank. The 'PERSON' section shows 'Last Name' 'Doe', 'First Name' 'Jane', and 'Middle Name' blank. The 'Prefix' is 'Ms.' and the 'Suffix' is blank. The 'Preferred First Name' is blank. The 'Full Legal Name' is blank. The 'NON-PERSON' section shows 'Name' blank. At the top right of the form, there are icons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. A green callout box labeled 'RELATED' points to the 'RELATED' icon, and another green callout box labeled 'TOOLS' points to the 'TOOLS' icon. The bottom right corner of the form indicates 'Start Over'.

RELATED icon is to help you see pages related to data on your current page; click the icon again to close the Related page.

The screenshot shows the Banner 9 interface with the 'RELATED' menu open. The menu lists several related pages: Recruiter Appointments and Visits [SRARAPT], IDs, Names and Addresses [SPAIDEN], Prospect Information Detail [SRARECR], Admissions Application Detail [SAAADMS], Detailed Student Information [SGASTDN], Student Mail [SUAMAIL], Telephones [SPATELE], and Person Comment [SPACMINT]. A green callout box labeled 'RELATED' points to the icon in the top navigation bar. Another green callout box points to the search field at the top of the menu, with the text 'Use search field to locate the specific page.' A third green callout box points to the menu items, with the text 'You can access the pages related to data on the current page.'

TOOLS menu contains standard actions, options, and Banner management functions based on the page you are viewing; click the icon again to close the Tools page.

The screenshot shows the Banner 9 interface with the 'TOOLS' menu open. The menu lists various actions: Refresh (F5), Export (Shift+F1), Print (Ctrl+P), Clear Record (Shift+F4), and Print Record (Shift+F5). It also includes sections for 'Item Properties' (Display ID Image, Exit Quickflow), 'About Banner', and 'BANNER DOCUMENT MANAGEMENT' (Retrieve Documents (Alt+R), Count Matched Documents, Add Documents). A green callout box labeled 'TOOLS' points to the icon in the top navigation bar. Another green callout box points to the search field at the top of the menu, with the text 'Use search field to locate the specific actions.' A third green callout box points to the list of actions, with the text 'Standard actions are listed here.'

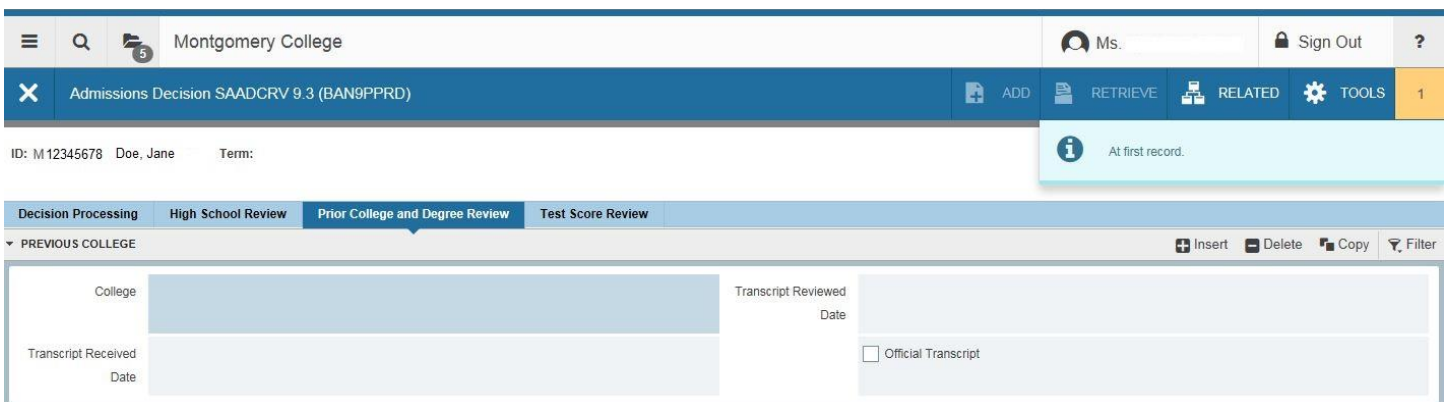
Notification Center is located at the header, and indicates the number of alerts. Re-click the number to close the message.

There are three alert levels:

- Green: Success/Saved
- Yellow: Warning
- Red: Fatal Error

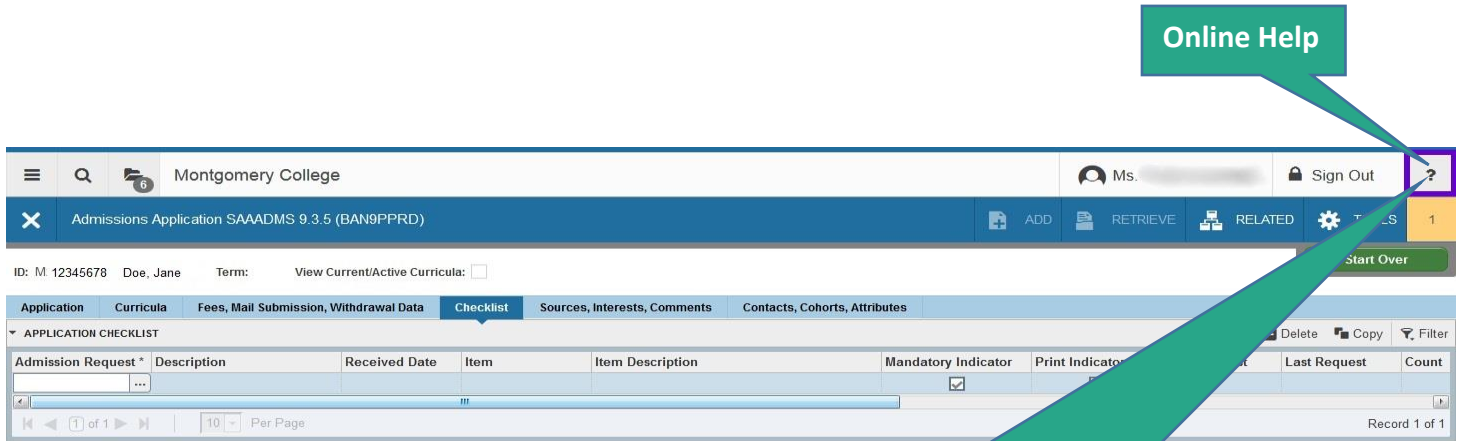


There are blue notifications which are informational messages.



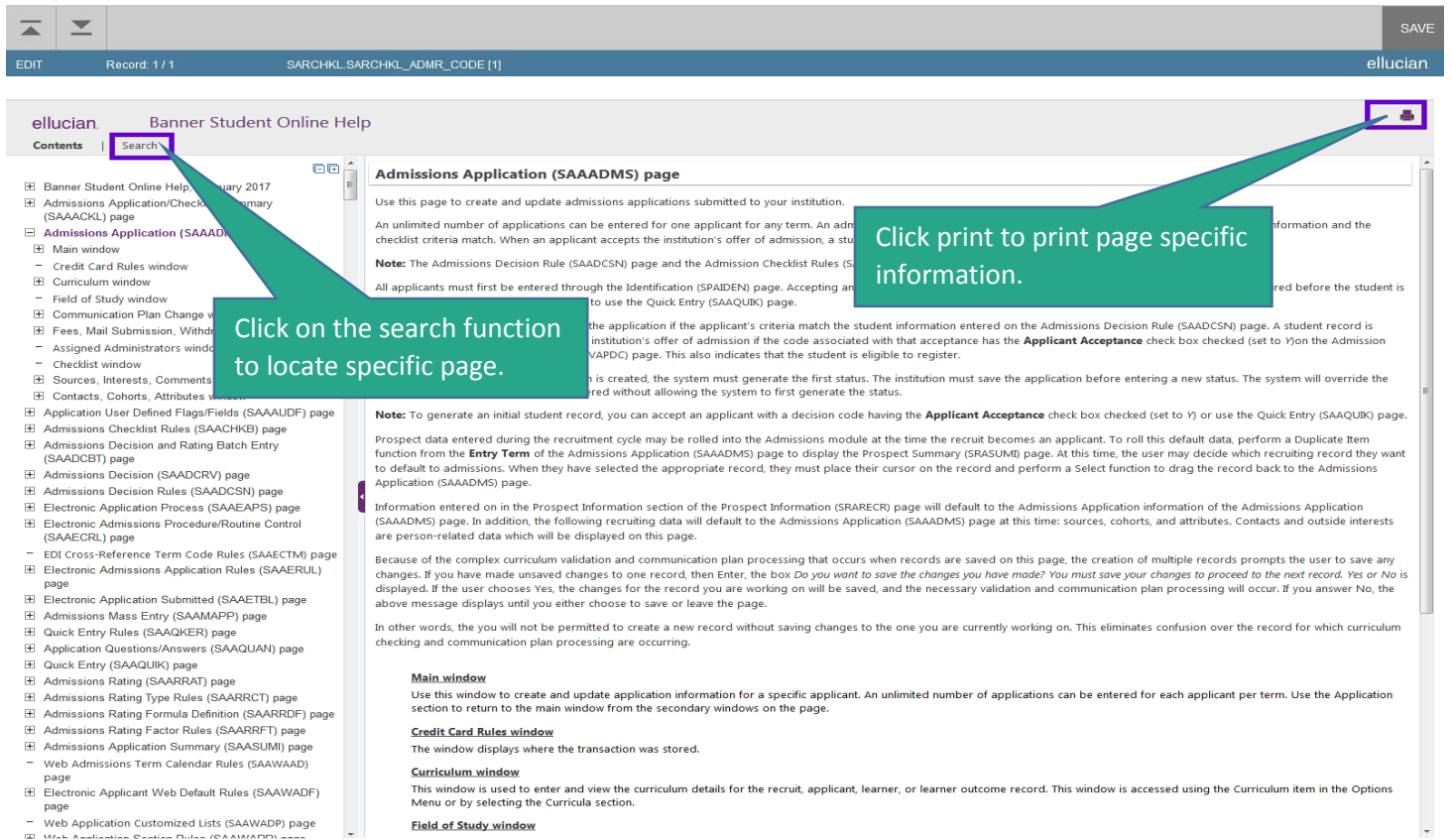
Banner 9 General Instruction Guide

Online Help: There is online help available for all pages at the top of the page.

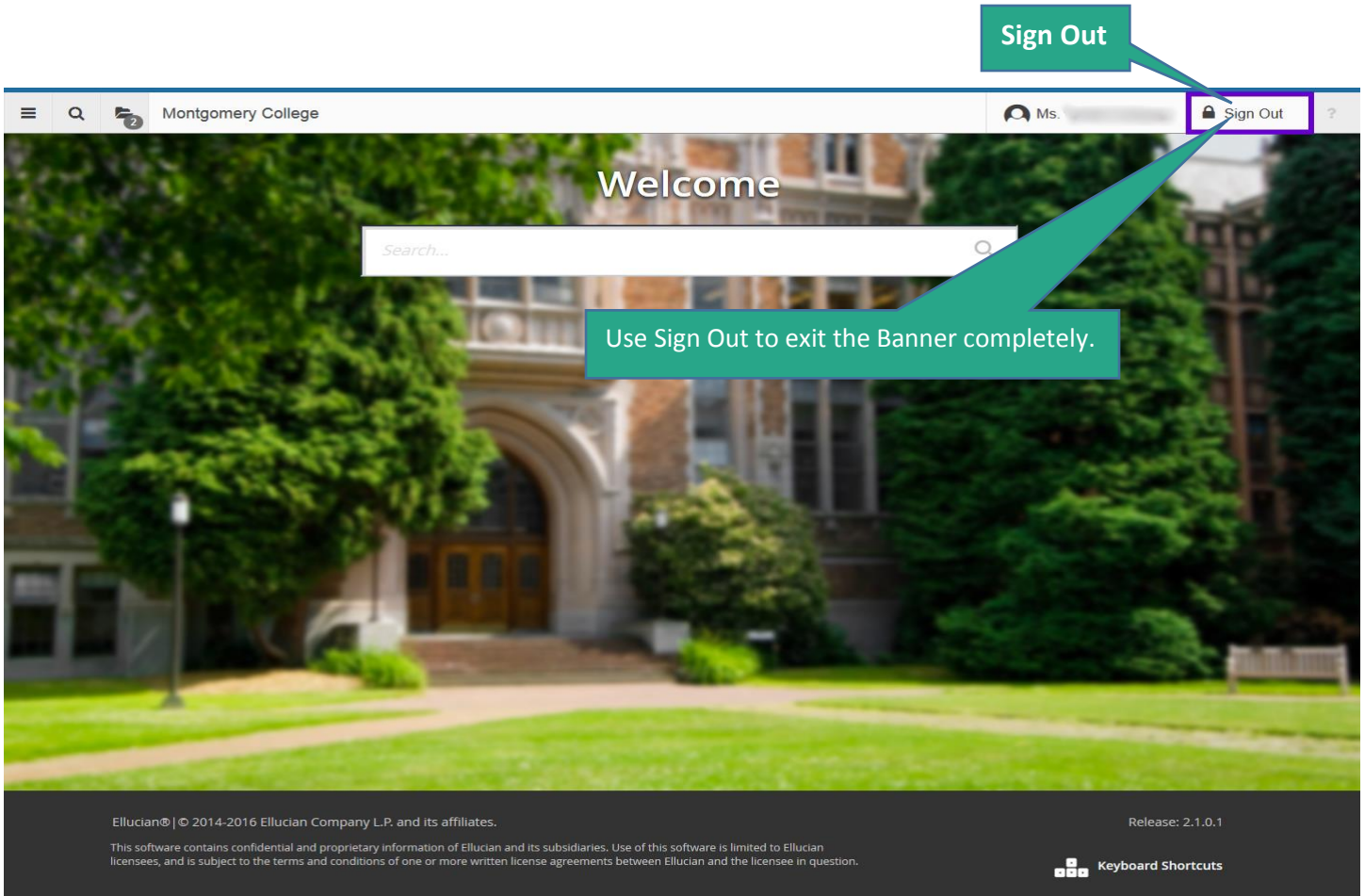


Click the help icon on any page.

The help page opens in separate window, so you can easily use it to locate information, and close the browser to exit help.



Sign Out It is important to log out of the application by clicking the Sign Out icon, instead of just closing your browser.



Contact Us

For specific questions about Banner 9, please contact the IT Service Desk:

- by clicking on the IT Service Desk icon found on your desktop
- by email at itservicedesk@montgomerycollege.edu
- by web chat at <https://www.montgomerycollege.edu/oit>
- by phone at 240-567-7222

Banner 9 Keyboard Shortcuts

The following table lists the keyboard shortcuts that you can use to navigate through Banner versions 8 and 9. **Bold** entries indicate actions with keyboard combinations that are new or updated in Banner 9.

Banner 8 VS Banner 9 Shortcut Keys (From Ellucian)		
ACTION	Banner 8 Key	Banner 9 Key
Cancel Page, Close Current, Page, or Cancel Search/Query (in Query mode)	CTRL+Q	CTRL+Q
Change MEP Context	Not applicable	ALT+SHIFT+C
Choose/Submit	ENTER	ENTER
Clear All in Section	SHIFT+F5	SHIFT+F5
Clear One Record	SHIFT+F4	SHIFT+F4
Clear Page or Start Over	SHIFT+F7	F5
Count Query	SHIFT+F2	SHIFT+F2
Delete Record	SHIFT+F6	SHIFT+F6
Down/Next Record	Down Arrow	Down Arrow
Duplicate Item	F3	F3
Duplicate Selected Record	F4	F4
Edit	CTRL+E	CTRL+E
Execute Filter Query	F8	F8
Exit	CTRL+Q	CTRL+Q
Expand/Collapse Drop-down Field	Click field	ALT+Down Arrow
Export	Extract Data with Key or Extract Data no Key	SHIFT+F1
First Page	Not applicable	CTRL+Home
Insert/Create Record	F6	F6
Last Page	Not applicable	CTRL+End
List of Values	F9	F9
More Information	ALT+H	CTRL+SHIFT+U
Next Field or Item	Tab	Tab
Next Page Down	Page Down	Page Down
Next Section	CTRL+Page Down	ALT+Page Down
Open Menu Directly	F5	CTRL+M

Banner 8 VS Banner 9 Shortcut Keys (From Ellucian)		
ACTION	Banner 8 Key	Banner 9 Key
Open Related Men	Not applicable	ALT+SHIFT+R
Open Tools Menu	Not applicable	ALT+SHIFT+T
Page Tab 1 Page Tab 2 and so on	Not applicable	CTRL+SHIFT+1 CTRL+SHIFT+2 and so on
Previous Field or Item	SHIFT + TAB	SHIFT + TAB
Previous Page Up	Page Up	Page Up
Previous Section	CTRL+Page Up	ALT+Page Up
Print	SHIFT+F8	CTRL+P
Refresh or Rollback	SHIFT+F7	F5
Save	F10	F10
Search or Open Filter Query	F7	F7
Select on a Called Page	SHIFT+F3	ALT+S
Toggle Multi/Single Records View	Not applicable	CTRL+G
Up/Previous record	Up Arrow	Up Arrow
Workflow		
Release Workflow	Icon or Menu	ALT+Q
Release Workflow	Icon or Menu	ALT+W
Banner Document Management		
Add BDM Documents	Icon or Menu	ALT+A
Retrieve BDM Documents	Icon or Menu	ALT+R
Application Navigator		
App Nav - Access Help	Banner 9 keyboard shortcuts for Application Navigator will work in Banner 8 if you are running Banner 8 with Application Navigator and have applied the keyboard shortcut configuration settings.	CTRL+M
App Nav - Access Menu		CTRL+Y
App Nav - Display recently opened items		CTRL+SHIFT+L
App Nav - Search		CTRL+SHIFT+Y
App Nav - Sign out		CTRL+SHIFT+F