

Banner 9 General Navigation Guide
OFFICE OF STRATEGIC ENROLLMENT

UNIVERSITY OF TEXAS RIO GRANDE VALLEY
1201 W University Dr., Edinburg Texas 78539

BANNER 9 GENERAL NAVIGATION GUIDE
Office of Strategic Enrollment

[Table of Contents](#)

Banner 9 Overview 3

Banner 9 vs Banner 8 3

Access to Banner 9 5

Application Navigator Layout..... 7

Basic Keyboard Shortcuts..... 7

Search Bar 8

QUERY: SPAIDEN 9

SPAIDEN Page: Person Search..... 10

SPAIDEN Page: Alternate ID Search 12

SPAIDEN Page: Using Wildcards..... 14

SPAIDEN: Saving Changes 16

Closing the Page..... 17

Banner Menu: SGASTDN 18

Help Option 21

SGASTDN: Related Pages 23

SGASTDN: Tools 24

SOAHOLD Page..... 25

SOAHOLD: Reviewing a Hold..... 25

SOAHOLD: Inserting a Hold 27

SOAHOLD: Releasing a Hold..... 32

History..... 33

Customizing Your Personal Menu: My Banner 34

My Banner Menu: Remove Pages from Favorites: 39

QuickFlows 41

Running a QuickFlow..... 41

Need a QuickFlow Created..... 49

All Keyboard Shortcuts..... 50

Banner 9 Overview

Banner INB has been upgraded from Banner 8 to Banner 9. The upgrade to Banner 9 provides a new, more modern user interface while keeping Banner functionality and data the same as the previous version.

The same data that was in Banner 8 is the same as in Banner 9.

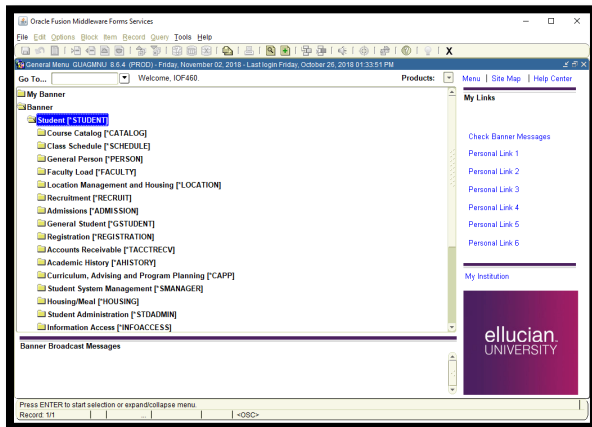
Features include:

- Navigation Improvements
- UTRGV Customized Branding
- Choice of Web Browsers
 - Google Chrome
 - Firefox
 - Safari
 - Microsoft Edge
- *NOTE: Banner 9 will no longer work with Internet Explorer
- Tablet Friendly.

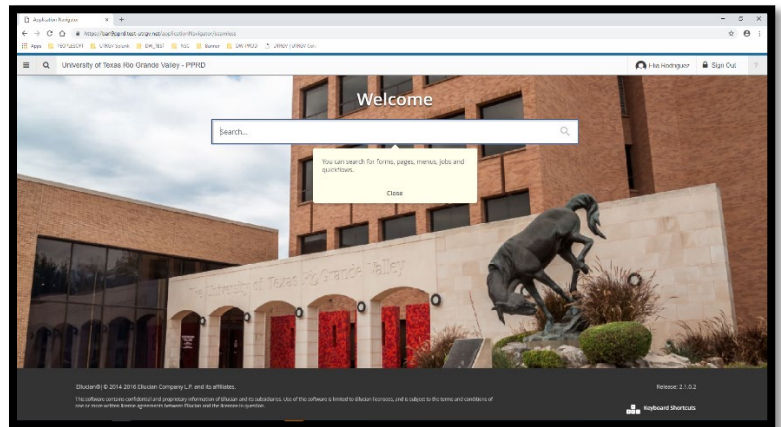
Banner 9 vs Banner 8

One of the main differences between Banner 8 and Banner 9, is that Banner 9 no longer requires Banner to be run with the Java Applet, but rather directly in a web browser. Users are no longer restricted to only using Internet Explorer to use Banner but can be done with other web browsers.

Banner 8

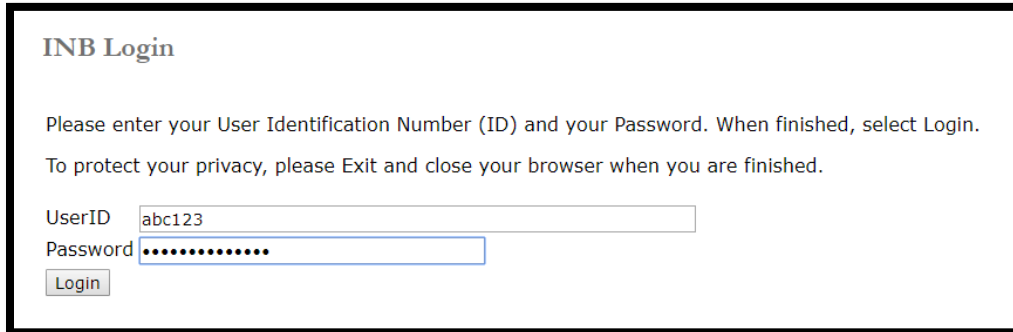


Banner 9



Another difference is Login Credentials for signing into Banner. Banner 8 used the user's Banner login information which consisted of Banner ID (ex. abc123) and UTRGV password. Banner 9 allows users to login with their UTRGV Credentials (UTRGV Email and UTRGV password).

Banner 8



INB Login

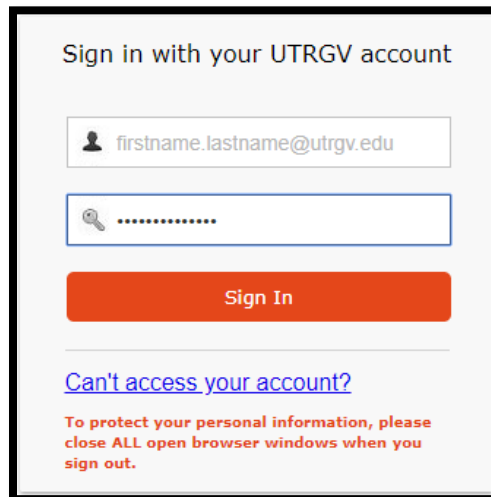
Please enter your User Identification Number (ID) and your Password. When finished, select Login.

To protect your privacy, please Exit and close your browser when you are finished.

UserID

Password

Banner 9



Sign in with your UTRGV account

[Can't access your account?](#)

To protect your personal information, please close ALL open browser windows when you sign out.

Access to Banner 9

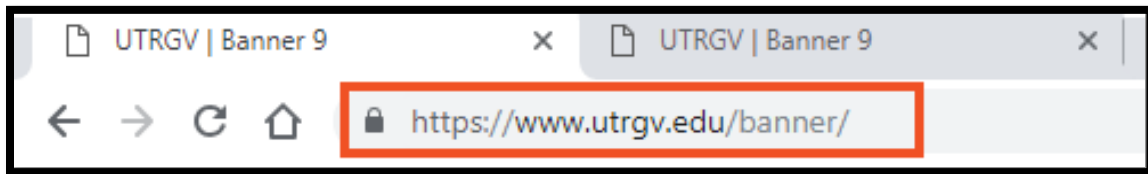
Keep in mind that this training guide is done in the Production Instance of Banner 9. Please be sure to not deviate from guide when first using Banner 9, and to not use any IDs other than the Test IDs provided. This is to ensure that you do not accidentally make changes to an actual ID.

To access Banner 9:

1. Open a Google Chrome browser window.

NOTE: Banner 9 works best with Google Chrome.

2. Enter **https://www.utrgv.edu/banner** into the address bar.



The Banner 9 website will be shown.

 A screenshot of the Banner 9 Upgrade website. The page features the UTRGV logo and the text "The University of Texas Rio Grande Valley". Below the logo is a navigation bar with "Home", "Training & Resources", and "FAQs". A "Quick Links" sidebar on the left lists "Home", "Training/Resources", "FAQs", "Keyboard Shortcuts", and "Banner 9 Admin Login". The main content area is titled "Banner 9" and contains a paragraph about the upgrade from Banner 8 to Banner 9, a "So, what's changing?" section, and a list of features to look forward to in Banner 9.

UTRGV The University of Texas Rio Grande Valley

Directory myUTRGV

Search...

Banner 9 Upgrade

Department of Information Technology

Home Training & Resources FAQs

Quick Links

- ✓ Home
- ✓ Training/Resources
- ✓ FAQs
- ✓ Keyboard Shortcuts
- ✓ Banner 9 Admin Login

Banner 9

UTRGV is in the process of upgrading our administrative Banner Student System from Banner 8 to Banner 9. The rollout of Banner 9 Admin in production is scheduled for mid-November. Banner 8 Admin and Banner 9 Admin will continue to run in parallel for a short period of time to assist with the transition to the new Banner user interface.

So, what's changing? The Banner 9 user interface will provide a more modern, and user-friendly experience. However, the changes (although significant) are primarily cosmetic in nature. All Banner functionality will remain intact. Also, the update only updates the interface to the data, not the underlying tables, processes, or data.

Here are some features you can look forward to in Banner 9:

- Updated Look-and-Feel and Enhanced Navigation
- Choose Your Web Browser - With Banner 9, you can use any type of modern web browser (i.e.

3. Under the **Quick Links** section, click on the **Banner 9 Admin Login** link.

Banner 9 Upgrade
Department of Information Technology

Home Training & Resources FAQs

Quick Links

- ✓ Home
- ✓ Training/Resources
- ✓ FAQs
- ✓ Keyboard Shortcuts
- ✓ **Banner 9 Admin Login**

Banner 9

UTRGV is in the process of upgrading our administrative Banner Student System from Banner 8 to Banner 9. The rollout of Banner 9 Admin in production is scheduled for mid-November. Banner 8 Admin and Banner 9 Admin will continue to run in parallel for a short period of time to assist with the transition to the new Banner user interface.

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Here are some features you can look forward to in Banner 9:

- Updated Look-and-Feel and Enhanced Navigation
- Choose Your Web Browser - With Banner 9, you can use any type of modern web browser (i.e. Chrome, Firefox). However, Banner 9 will no longer work with Internet Explorer.
- Tablet Friendly - Banner 9 works on large-screen mobile devices, like tablets and iPads.

Please note that Banner Self-Service (ASSIST) is not changing at this time.

4. Enter your UTRGV credentials (UTRGV email and UTRGV password).

Sign in with your UTRGV account

[Can't access your account?](#)

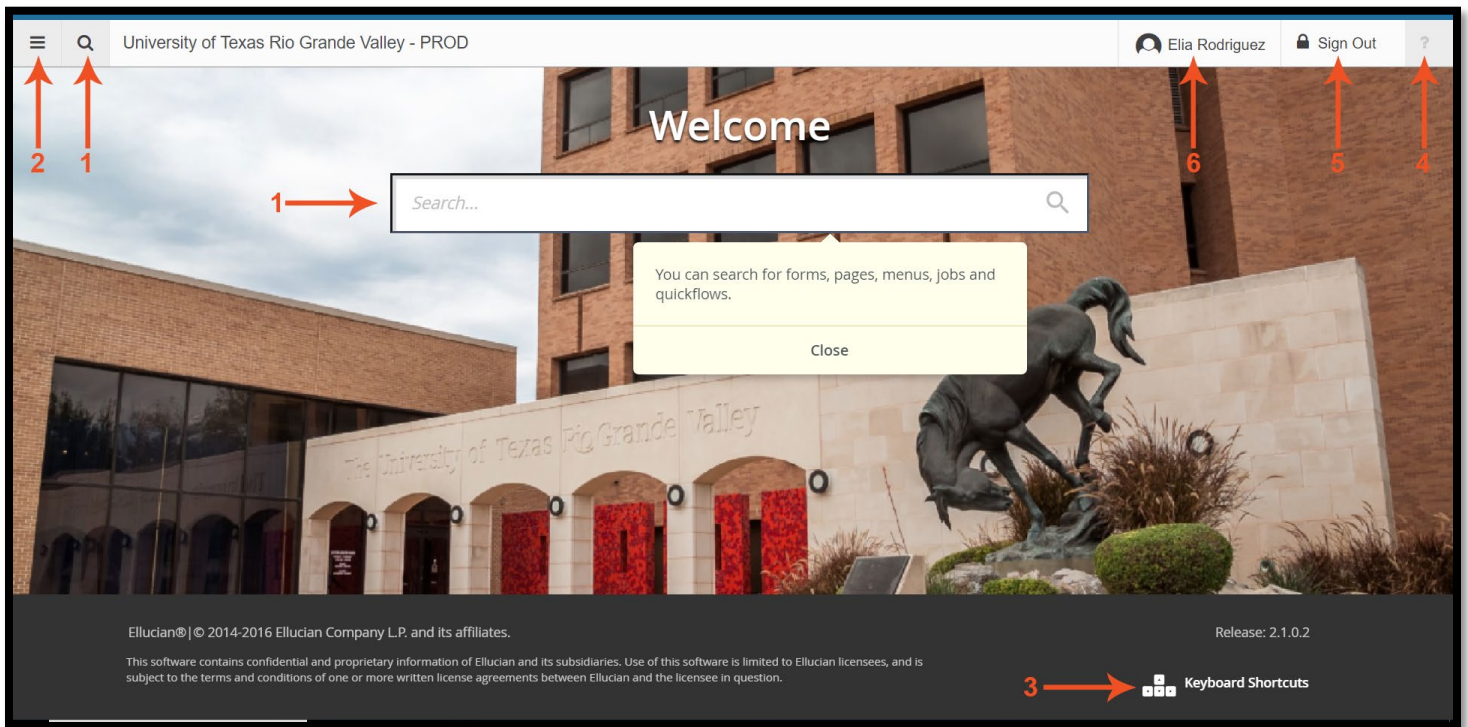
To protect your personal information, please close ALL open browser windows when you sign out.

Sign in with your UTRGV account

[Can't access your account?](#)

To protect your personal information, please close ALL open browser windows when you sign out.

Application Navigator Layout



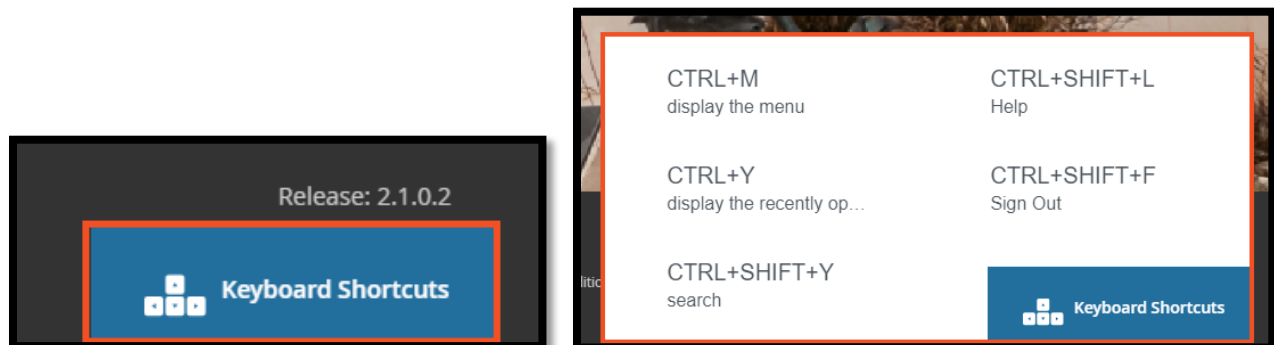
1. **Search Bar/Search Icon:** search for forms, menus, jobs and quick flows
2. **Menu:** pulls up the Banner Menu
3. **Keyboard Shortcuts:** shows basic keyboard shortcuts
4. **Help Button:** is only available on certain forms. When available will give information on the form currently being viewed.
5. **Sign Out:** Sign out of Banner
6. **Name:** displays full name of current user

Basic Keyboard Shortcuts

If you forget what the basic Keyboard Shortcuts are, Banner 9 conveniently added a quick reference for these shortcuts.

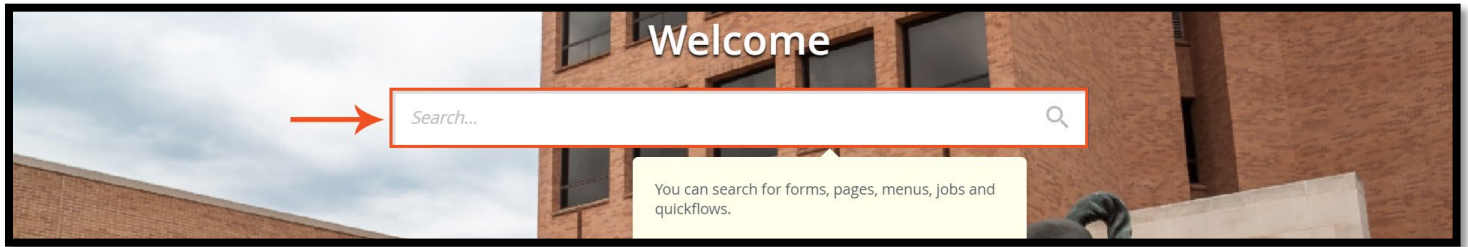
To view these **Keyboard Shortcuts**:

1. Click on **Keyboard Shortcuts** located at the bottom-right of page.

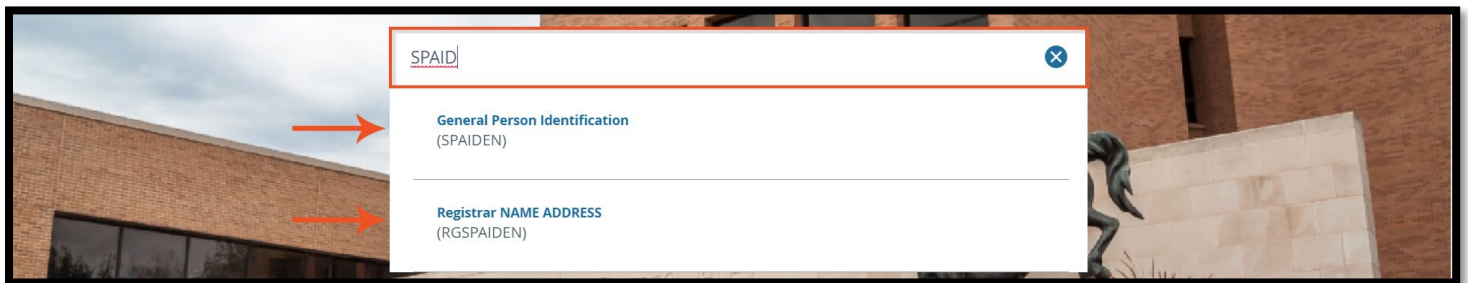


Search Bar

Use the **Search Bar** to search for forms, menus, jobs and quick flows.

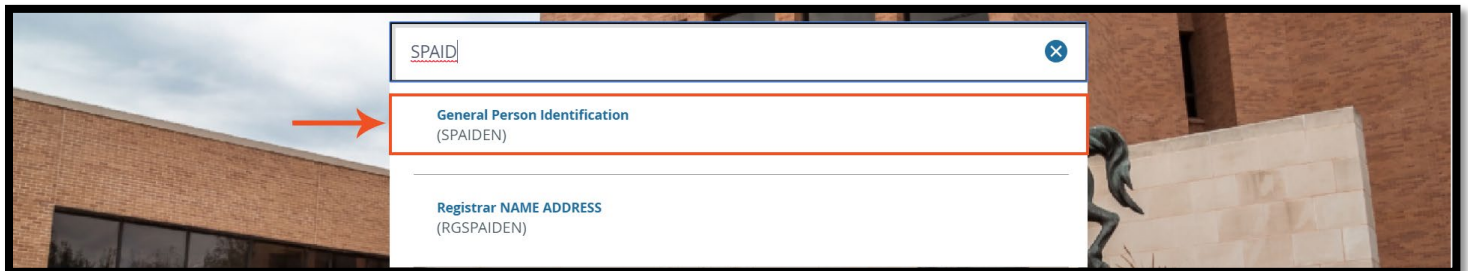


1. Begin typing in the name of the page you want (training example: **SPAIDEN**).

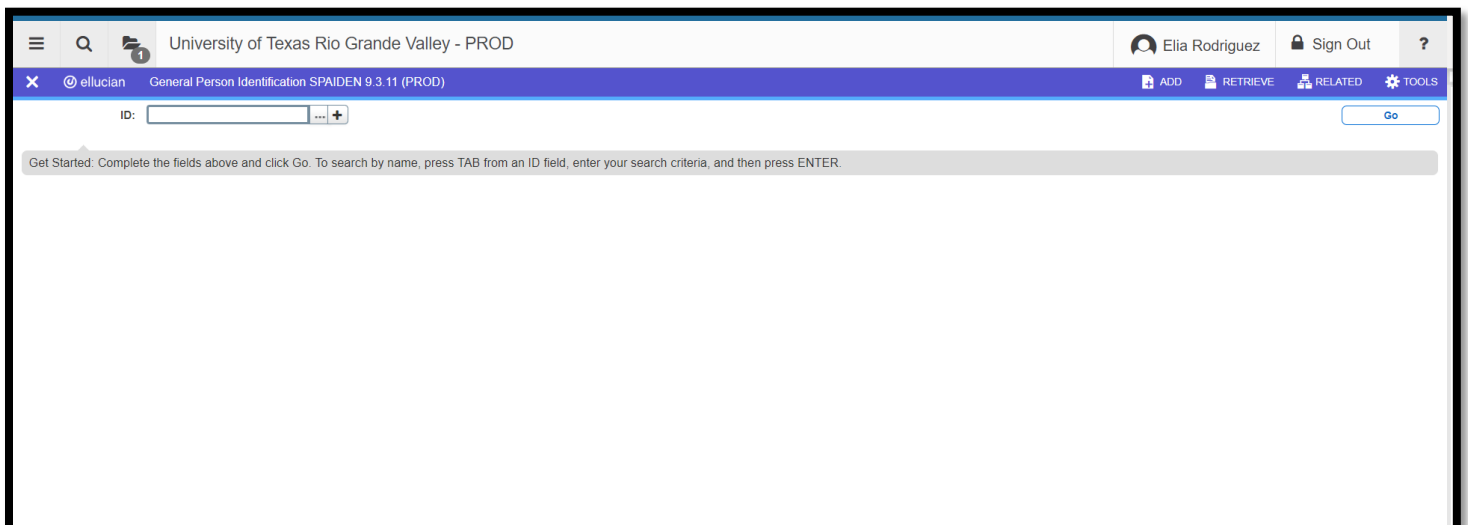


Pages will be populated in a drop-down menu.

2. Select the page you want by clicking on it.



3. You can now begin to query the **SPAIDEN** page.



QUERY: SPAIDEN

To query the SPAIDEN page:

1. Enter the ID (example: X00000096) into the **ID** field and click on **Go** or use the keyboard shortcut of **Alt + PageDown**.

The screenshot shows the top navigation bar of the University of Texas Rio Grande Valley - PROD system. The user is logged in as Elia Rodriguez. The main header displays the current page: General Person Identification SPAIDEN 9.3.11 (PROD). Below the header, there is a search bar with the ID field containing 'X00000096' and a 'Go' button. Red arrows point to the ID field and the Go button.

2. **SPAIDEN** information for ID will be shown.

The screenshot shows the SPAIDEN information page for ID X00000096. The page is titled 'General Person Identification SPAIDEN 9.3.11 (PROD)'. The ID field is populated with 'X00000096' and the name 'Banner8.5, Test'. The page is divided into several sections: 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', 'Emergency Contact', and 'Additional Identification'. The 'Current Identification' section shows the ID and Name Type. The 'PERSON' section shows fields for Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name. The 'NON-PERSON' section shows the Name field. The 'ID AND NAME SOURCE' section shows the Last Update, Origin (SPAIDEN), Original Creation, User (RRODRIGUEZ76), and Create Date (09/29/2013). A 'Start Over' button is located in the top right corner.

3. Access a **SPAIDEN** tab by clicking on it.

The screenshot shows the SPAIDEN information page for ID X00000096, with the 'Alternate Identification' tab selected. The page displays the 'ALTERNATE NAMES OR IDS' section, which includes fields for Name Type, Change Type, ID, Last Name, First Name, Middle Name, Origin, Create User, and Create Date. The 'Start Over' button is still visible in the top right corner. A red arrow points to the 'Alternate Identification' tab.

4. To query a different other ID, click on the **Start Over** button located at the top right corner or use the keyboard shortcut **F5**.

The screenshot shows the SPAIDEN information page for ID X00000096, with the 'Start Over' button highlighted by a red box and a red arrow. The 'Alternate Identification' tab is still selected.

SPAIDEN Page: Person Search

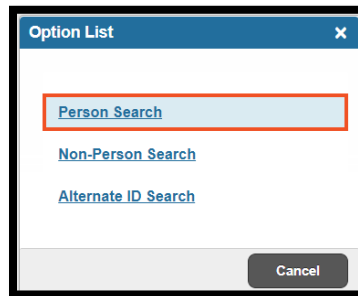
If you do not know the ID, you can also search by First Name, Last Name, Middle Name and Change Indicator.

To search based on a name:

1. Click on the **Search (...)** button.



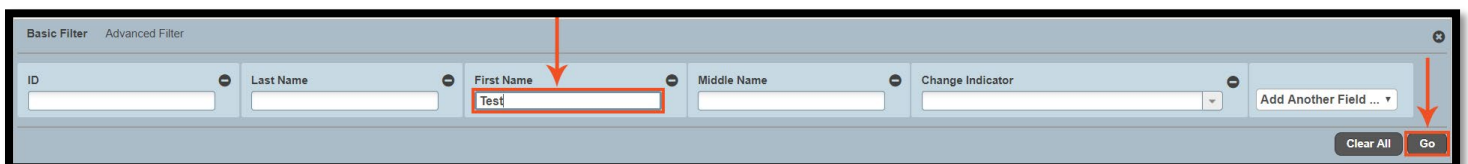
2. An **Option List** will be displayed showing different search options. Click on **Person Search**.



3. The **Basic Filter for Person search (SOAIDEN)** will appear.



4. Begin by typing in a name (first, last, middle) of the individual you are searching for in the appropriate **input box**. In this example, I will search for IDs with a **First Name** of **Test**.
5. Click **Go** or use Keyboard Shortcut **F8**.



6. A list of IDs, whose First Name equals Test, will be displayed.

PERSON SEARCH

Active filters: First Name : Test [Clear All](#) [Filter Again](#)

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
X00000096	Banner8.5	Test		12/12/1900	Name Change			
X00000096	Banner8.5	Test		12/12/1900				
X00000099	Orientation1	Test		08/16/1992				
X00000100	Orientation2	Test		08/08/1993				
20016158	Test	Test		01/01/1991				
U00014461	Test	Test		01/01/1991	ID Change			
20102161	Tests	Test		11/11/1982				
20332821	User	Test		01/01/1985				

Record 1 of 8

7. Select the ID (example: X00000099) you want to query, then click on the **Select** button located on the bottom-right corner or double-click the ID.

PERSON SEARCH

Active filters: First Name : Test [Clear All](#) [Filter Again](#)

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
X00000096	Banner8.5	Test		12/12/1900	Name Change			
X00000096	Banner8.5	Test		12/12/1900				
X00000099	Orientation1	Test		08/16/1992				
X00000100	Orientation2	Test		08/08/1993				
20016158	Test	Test		01/01/1991				
U00014461	Test	Test		01/01/1991	ID Change			
20102161	Tests	Test		11/11/1982				
20332821	User	Test		01/01/1985				

Record 3 of 8

Case Insensitive Query Case Sensitive Query

[CANCEL](#) [SELECT](#)

QUERY Record: 3/8 SPRIDEN SPRIDEN_ID [3] ©2000 - 2018 Ellucian. All rights reserved. ellucian.

8. The ID will be populated into the ID field. Click **Go** or use the keyboard shortcut **Alt + PageDown**.

ellucian General Person Identification SPAIDEN 9.3.11 (PROD)

ID: X00000099 Orientation1, Test [Go](#)

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER. [Go \(Alt+PageDown\)](#)

ellucian General Person Identification SPAIDEN 9.3.11 (PROD)

ID: X00000099 Orientation1, Test [Start Over](#)

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

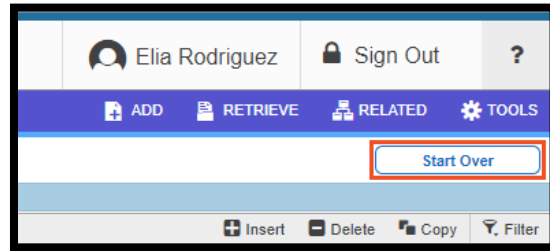
IDENTIFICATION [Insert](#) [Delete](#) [Copy](#) [Filter](#)

ID: X00000099 Name Type: ...

PERSON [Insert](#) [Delete](#) [Copy](#) [Filter](#)

Last Name: Orientation1 Prefix: ...
 First Name: Test Suffix: ...
 Middle Name: Preferred First Name: ...
 Full Legal Name: ...

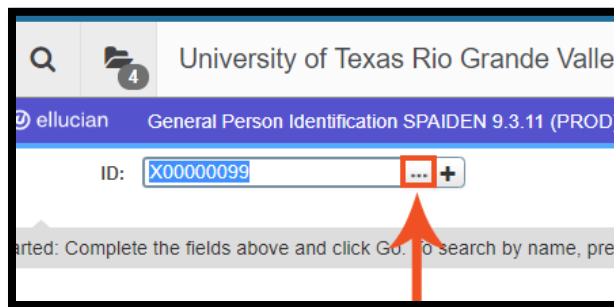
9. To query another ID, click on **Start Over** or use the keyboard shortcut **F5**.



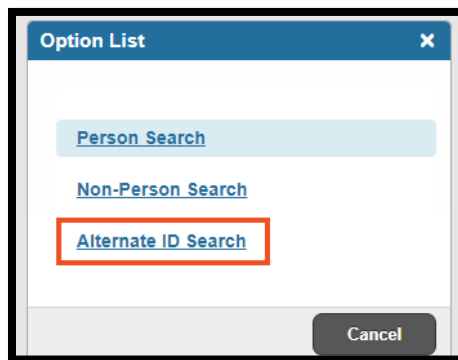
SPAIDEN Page: Alternate ID Search

To search by SSN/SIN/TIN/Birthdate:

1. Click on the **Search** icon.



2. Select **Alternate ID Search** from the **Option List** window.

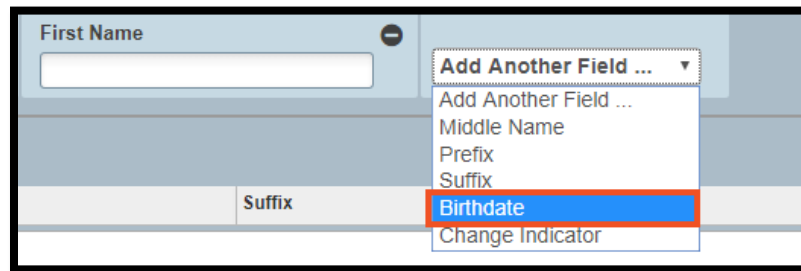


*NOTE: DUE TO FERPA, WE WILL NOT BE SEARCHING BY SSN IN TRAINING OR IN THIS GUIDE, AND INSTEAD WILL BE SEARCHING BY BIRTHDATE OF A TEST ID.

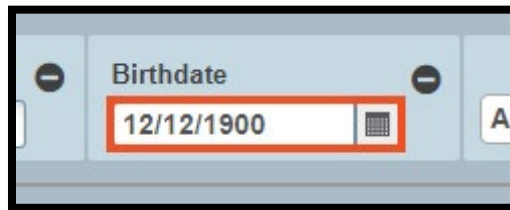
3. The Birthdate filter is not shown, so click the **down arrow** next to the **Add Another Field** box.



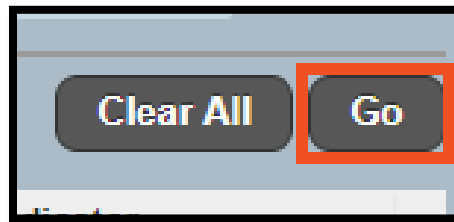
4. Select **Birthdate** from the list of options shown.



5. Enter in the birthdate you wish to search by. In this example we will use the birthdate of a test individual which is 12/12/1900.
NOTE: Birthdate format is month/day/year. For example, a birthdate of January 30, 1900 needs to be entered: 01/30/1900 or 01301900.



6. Click **Go** or use the keyboard shortcut **F8**.



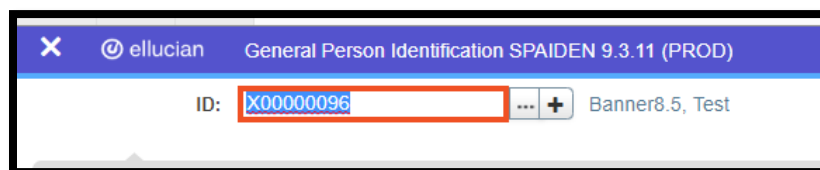
A screenshot of a web application interface showing search results. The browser title is 'SSN/SIN Alternate ID Search GUI/ALTI 9.3.6 (PROD)'. The search criteria is 'Birthdate: 12/12/1900'. The results are displayed in a table with the following columns: SSN/SIN/TIN, ID, Person or Non-Person, Last Name, First Name, Middle Name, Prefix, Suffix, Birthdate, and Change Indicator.

SSN/SIN/TIN	ID	Person or Non-Person	Last Name	First Name	Middle Name	Prefix	Suffix	Birthdate	Change Indicator
	X00000096	Person	Banner8.5	Test				12/12/1900	Name Change
	X00000096	Person	Banner8.5	Test				12/12/1900	Name Change
	X00000096	Person	Banner8.5	Test_1				12/12/1900	Name Change

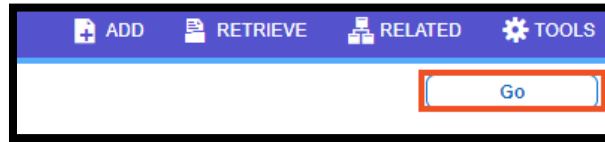
At the bottom of the table, there are navigation controls: '1 of 1' pages, '10' items per page, and radio buttons for 'Case Insensitive Query' (selected) and 'Case Sensitive Query'. The page number 'Record 1 of 3' is shown in the bottom right corner.

List of IDs that have a birthdate of 12/12/1900 will be shown.

7. Double-click on an ID to populate it in the ID field.



- Click **Go** or use the keyboard shortcut **Alt + PageDown**.



SPAIDEN data for Test ID queried will be shown.

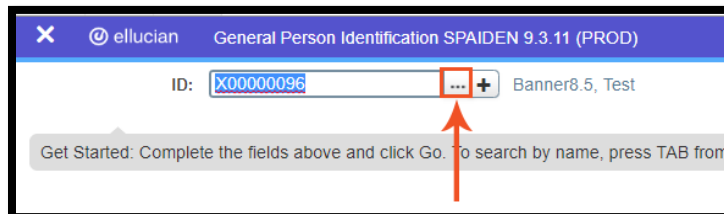
 A screenshot of the SPAIDEN search results page. The browser title is 'ellucian General Person Identification SPAIDEN 9.3.11 (PROD)'. The page shows search results for ID 'X00000096' and Name 'Banner8.5, Test'. Below the search results, there is a 'PERSON' section with several input fields: Last Name (Banner8.5), First Name (Test), Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name. The 'PERSON' section is highlighted with a red rectangular box.

SPAIDEN Page: Using Wildcards

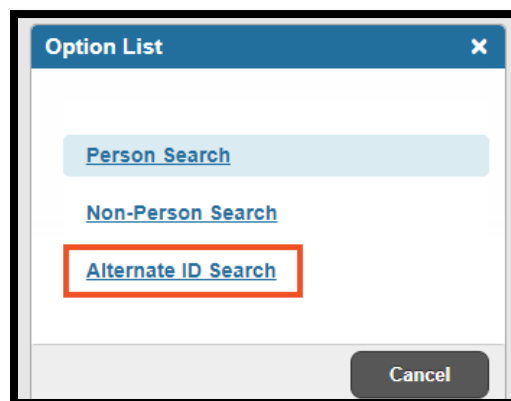
You can also use a Wildcard to perform a partial match lookup.

To use a wild card:

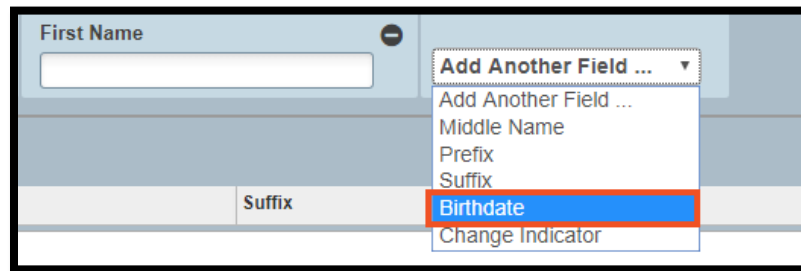
- Click on the **Lookup** icon.



- Select **Alternate ID Search** from the **Option List** window.

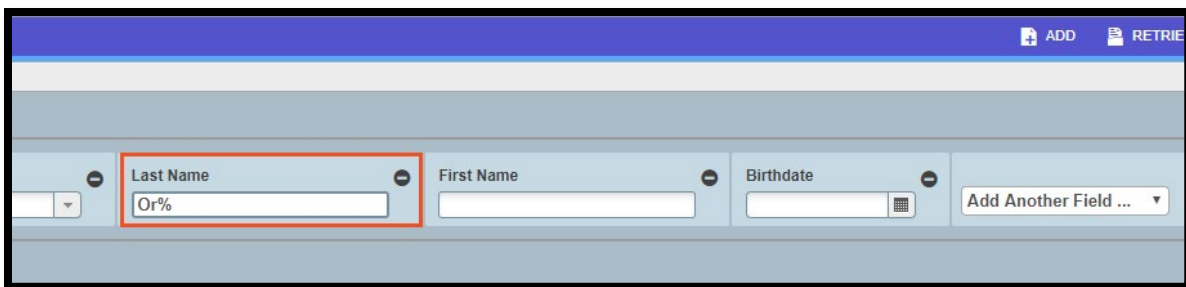


- Click the **down arrow** next **Add Another Field** and choose **Birthdate** from the list of options.



A screenshot of a search interface. The 'First Name' field is visible at the top. Below it, a dropdown menu is open, showing options: 'Add Another Field ...', 'Add Another Field ...', 'Middle Name', 'Prefix', 'Suffix', 'Birthdate', and 'Change Indicator'. The 'Birthdate' option is highlighted with a red box.

- Enter **Or%** into the **Last Name** field. We are looking for an ID with a first name of **Test** and a Last name of **Orientation**, but because we are using a Wildcard, we are only entering the first two letters of the last name plus the % symbol.



A screenshot of the search interface. The 'Last Name' field contains 'Or%' and is highlighted with a red box. The 'First Name' field is empty. The 'Birthdate' field is empty. The 'Add Another Field ...' dropdown is visible on the right.

- Enter **te%** into the **First Name** field.



A screenshot of the search interface. The 'Last Name' field contains 'Or%' and the 'First Name' field contains 'te%'. Both fields are highlighted with red boxes. The 'Birthdate' field is empty. The 'Add Another Field ...' dropdown is visible on the right.

- In the **Birthdate** field, enter 08/16/1992 or 08161992.



A screenshot of the search interface. The 'Last Name' field contains 'Or%', the 'First Name' field contains 'te%', and the 'Birthdate' field contains '08161992'. The 'Birthdate' field is highlighted with a red box. The 'Add Another Field ...' dropdown is visible on the right.

- Click **Go** or use the keyboard shortcut **F8**.



A screenshot of the search interface. The 'Last Name' field contains 'Or%', the 'First Name' field contains 'te%', and the 'Birthdate' field contains '08161992'. The 'Go' button is highlighted with a red box.

The following result is shown.

SSN/SIN Alternate ID Search GUI/ALTI 9.3.6 (PROD)

TERNATE ID SEARCH

Last Name : Or% First Name : te% Birthdate: 08161992 Clear All

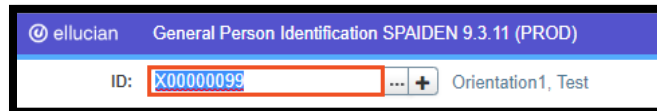
ID	Person or Non-Person	Last Name	First Name	Middle Name	Prefix	Suffix	Birthdate
X00000099	Person	Orientation1	Test				08/16/1992

10 Per Page

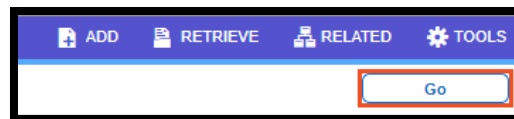
8. Click **Select** on the bottom-right corner of screen or use the keyboard shortcut **Alt + S**.



ID has been populated.



9. Click **Go** or use the keyboard shortcut **Alt + PageDown**.



ellucian General Person Identification SPAIDEN 9.3.11 (PROD)

ID: X00000099 Orientation1, Test Start Over

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

IDENTIFICATION

ID: X00000099 Name Type: ...

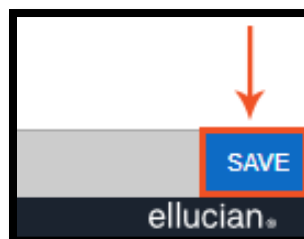
PERSON

Last Name: Orientation1 First Name: Test Middle Name: Prefix: Suffix: Preferred First Name: Full Legal Name:

SPAIDEN: Saving Changes

We won't be making any changes/saving changes in this training.

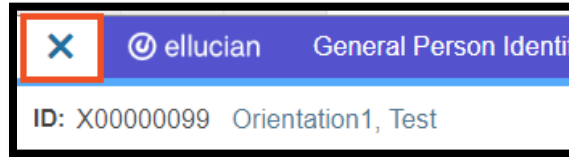
But when working on your own pages, and you need to save any changes, click on the **Save** button on the bottom right corner of the page or use the keyboard shortcut **F10**.



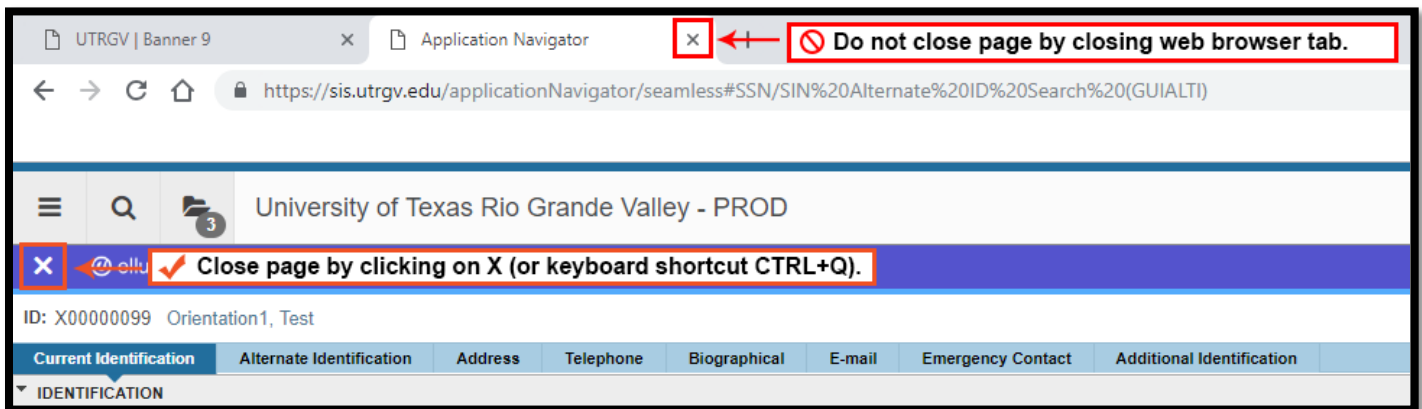
Closing the Page

To close the SPAIDEN page:

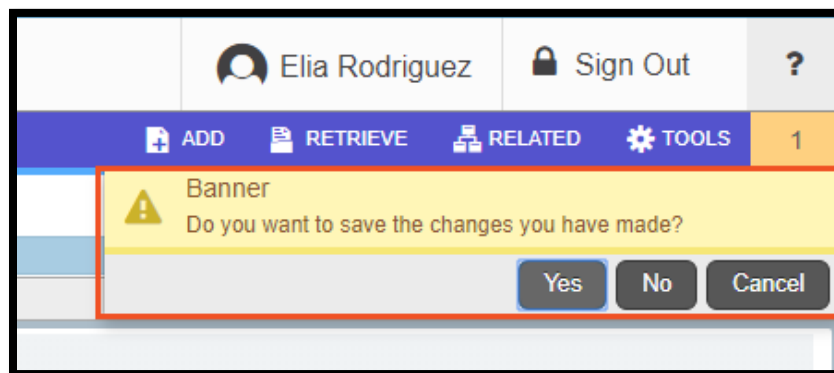
1. Click the 'X' that is located at the top-left corner of the Navigation bar or use keyboard shortcut **Ctrl + Q**.



NOTE: It is always recommended to close pages using the 'X' or keyboard shortcut **CTRL+Q** and not closing of a page by closing the web browser tab.



The reason for this is because if you close the page by clicking on the 'X' (or using the keyboard shortcut Ctrl+), and you have made changes but have not saved those changes, Banner will have a yellow warning message pop up in the top-right corner of the screen asking if you want to save the changes you have made.

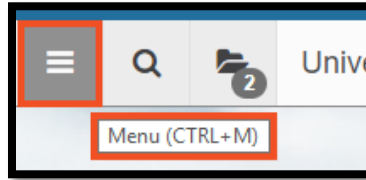


However, if you have made changes, and then try closing the web browser window (without saving changes), no warning message will appear, and your changes will not be saved.

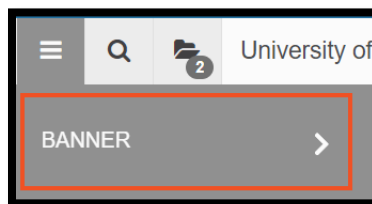
Banner Menu: SGASTDN

If the name of a page is not known you can also use the Menu to browse through the various menus.

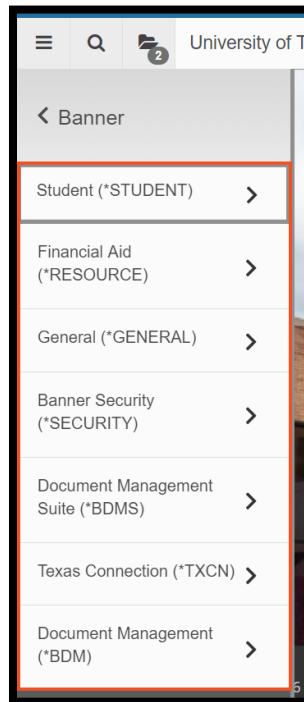
1. Click on the **Menu** icon located at the top-corner of screen.
NOTE: You can also use the shortcut **Ctrl + M**.



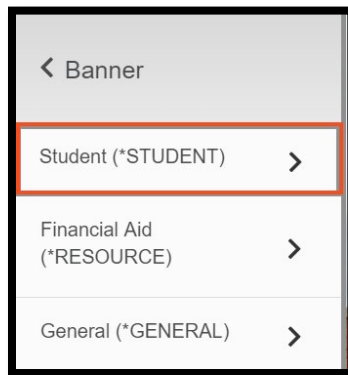
2. Click on **Banner**.



3. A list of menus will be shown.

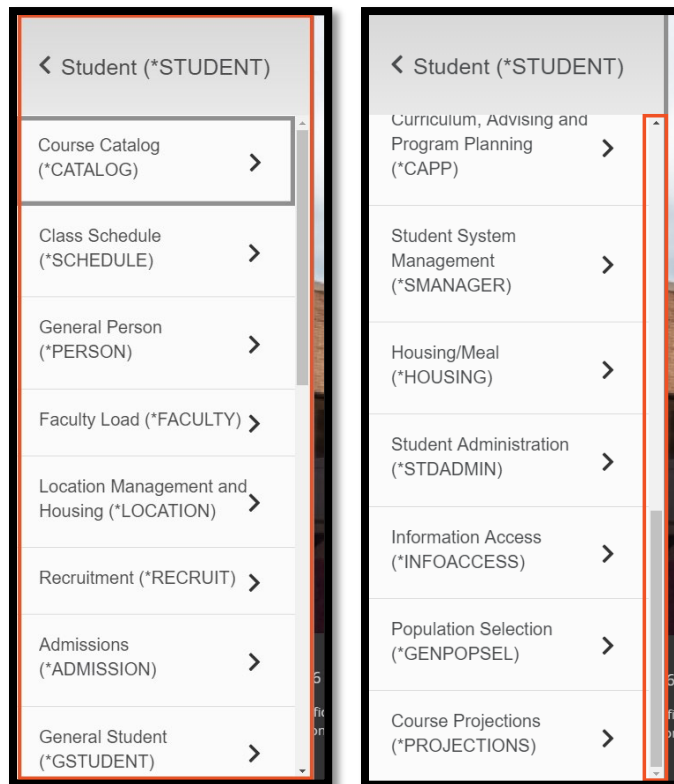


- Click on any of the menus shown. For demonstration purposes, we will be clicking on the **Student** menu.

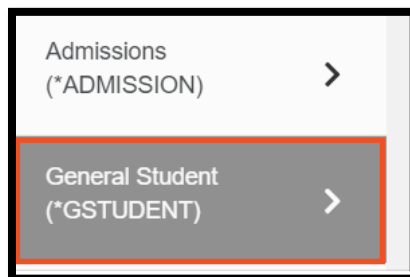


- Student menus will be shown.

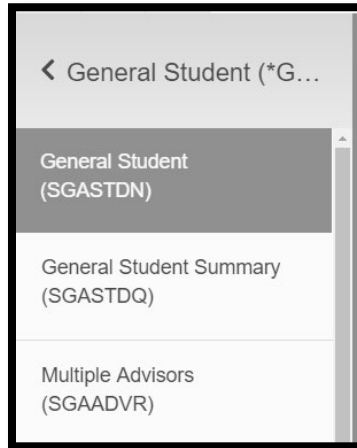
NOTE: If you do not see a menu, use the **Scroll Bar** to scroll down.



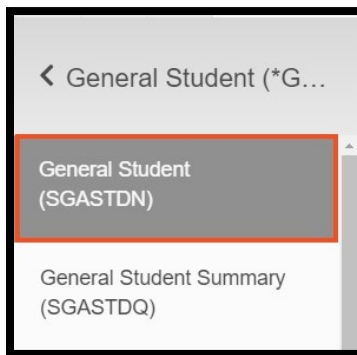
- Click on the **General Student (*GSTUDENT)** menu.



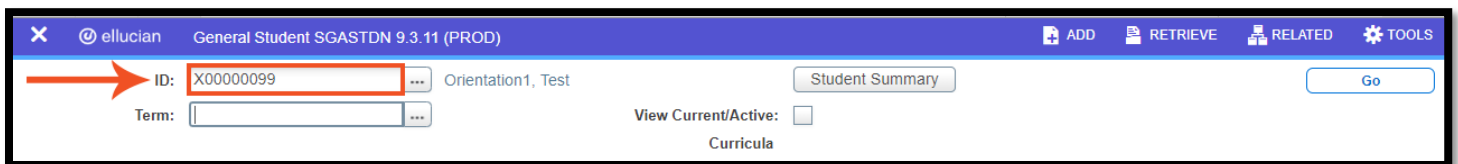
7. List of pages for the **General Student** menu will be shown.



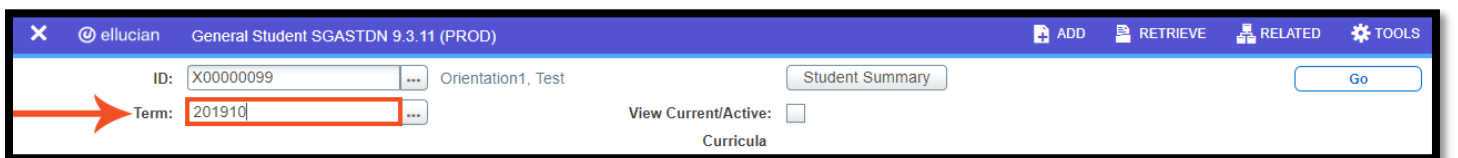
8. Click on the **General Student (SGASTDN)** page.



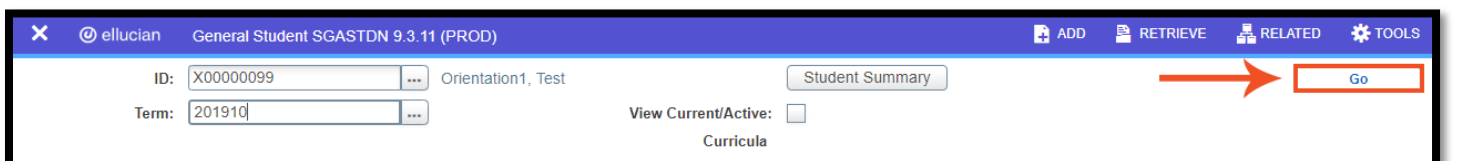
The SGASTDN page will be shown will be shown. As you can see the ID from the query we ran in SPAIDEN has been populated into the ID field.



9. Enter in the term code **201910** into the **Term** field.



10. Click **Go** or use the keyboard shortcut **Alt + PageDown**.

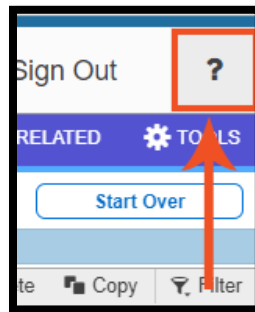


SGASTDN information for the ID and term code queried will be shown.

Help Option

If you would like to know more about a form use the Help button.

- To bring up the Help Option, click on the **Help (?)** icon or use the Keyboard Shortcut **CTRL+SHIFT+L**.



A new window will open with information about the **General Student (SGASTDN)** page will be shown.

General Student (SGASTDN) page

The purpose of the General Student Form is to maintain current and historical information about a student (learner).

This information is initially created when a decision is entered on the Admissions Decision (SAADCRV) page, which indicates that the applicant accepts the institution's offer of admission, or when an applicant is admitted through the Quick Entry (SAAQUIK) page. SGASTDN also contains curriculum, field of study, comments, activities, veteran, and degree information. An applicant must accept the institution's offer of admissions to generate an initial student record, or the Quick Entry (SAAQUIK) page must have been processed for the student. This record may not be deleted if registration or academic history exists for the term or if associated sports records exist.

Main window
The main window contains the Key block, the General Learner section, the Curricula Summary section, and the Field of Study Summary section.

Curriculum window
This window is used to enter and view the curriculum details for the recruit, applicant, learner, or learner outcome record. This window is accessed using the Curriculum item in the Options Menu or by selecting the Curricula section.

Field of Study window
This window is used to enter and view the field of study details for the recruit, applicant, learner, or learner outcome.

Communication Plan Change window
When items such as campus, level, college, or degree are changed for a student, this may affect their communication plan, depending

2. Click on an **Underlined** section to be taken to the **Help** page for that section.

(SAAAUDF) page

- ⊞ Admissions Checklist Rules (SAACHKB) page
- ⊞ Admissions Decision and Rating Batch Entry (SAADCBT) page
- ⊞ Admissions Decision (SAADCRV) page
- ⊞ Admissions Decision Rules (SAADCSN) page
- ⊞ Electronic Application Process (SAAEAPS) page
- ⊞ Electronic Admissions Procedure/Routine Control (SAAECRL) page
- EDI Cross-Reference Term Code

Main window
The main window contains the Key block, the General Learner section, the Curricula Summary section, and the Field of Study Summary section.

Curriculum window
This window is used to enter and view the curriculum details for the recruit, applicant, learner, or learner outcome record. This window is accessed using the Curriculum item in the Options Menu or by selecting the Curricula section.

Field of Study window
This window is used to enter and view the field of study details for the recruit, applicant, learner, or learner outcome.

Communication Plan Change window
When items such as campus, level, college, or degree are changed for a student, this may affect their communication plan, depending on the rules for the institution set up on the Communication Rules (SOACOMM) page.

ellucian. Banner Student Online Help

Search

Content General Student (SGASTDN) page Parent topic

Field of Study window

This window is used to enter and view the field of study details for the recruit, applicant, learner, or learner outcome.

It displays certain fields from the curriculum record and all field of study records. You can only access the Field of Study window from the Curriculum window. Use the Field of Study section to access this window when you are in the Curriculum window.

Note: Use the **View Current/Active Curricula (Indicator)** in the Key block to control if you want only current and active curriculum records to be displayed in the Curriculum and Field of Study windows.

The **Attached Concentrations** button is enabled when the cursor is on a field of study record for a major with attached concentrations. Click on the button to display a list of the attached concentrations in a pop-up window. The button is not enabled if the cursor is on a record for a major with no attached concentrations, or if the record is for a minor or a concentration.

The **Inactivate** button is used to insert a copy of that field of study record with values of *INACTIVE* in the **Activity** field and *REMOVED* in the **Status** field.

3. Or use the **Search bar** to search for a specific topic.

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SOATERM

Content Search Results General Student (SGASTDN) page Parent topic

Results for: SOATERM

Term Control Page (SOATERM)
Use the Term Control (SOATERM) page to establish controls for a specific term. These controls affect the following areas: catalog, schedule, registration, registration fee assessment, and telephone registration processing... ★★★★★

Field of Study window

This window is used to enter and view the field of study details for the recruit, applicant, learner, or learner outcome.

It displays certain fields from the curriculum record and all field of study records. You can only access the Field of Study window from the Curriculum window. Use the Field of Study section to access this window when you are in the Curriculum window.

Note: Use the **View Current/Active Curricula (Indicator)** in the Key block to control if you want only current and active curriculum records to be displayed in the Curriculum and Field of Study windows.

The **Attached Concentrations** button is enabled when the cursor is on a field of study record for a major with attached concentrations. Click on

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SOATERM

Content Search Results

Results for: SOATERM

[Term Control Page \(SOATERM\)](#)
 Use the Term Control (SOATERM) page to establish controls for a specific term. These controls affect the following areas: catalog, schedule, registration, registration fee assessment, and telephone registration processing... ★★★★★

[Faculty Self-Service Display Controls](#)
 Use this section of the page as a section level override of the term level values

Term Control Page (SOATERM)

Use the Term Control (SOATERM) page to establish controls for a specific term. These controls affect the following areas: catalog, schedule, registration, registration fee assessment, and telephone registration processing.

Before entering information on this page, a term must be created on the Term Code Validation (STVTERM) page. This page must be completed before the catalog and schedule can be built and before registration can take place.

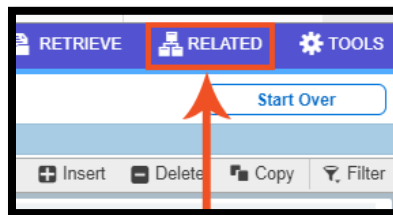
This page is composed of the following sections:

- key block
- Term Information
- Base Part of Term
- Access Management

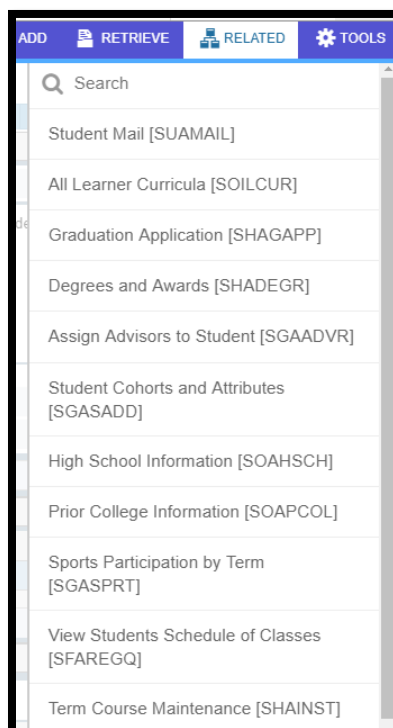
SGASTDN: Related Pages

You can also view pages that are related to the current (in this case SGASTDN) page.

1. Click on the **Related** icon or use the keyboard shortcut **Alt + Shift + R**.



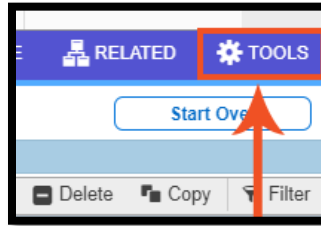
2. A list of related pages will be shown.



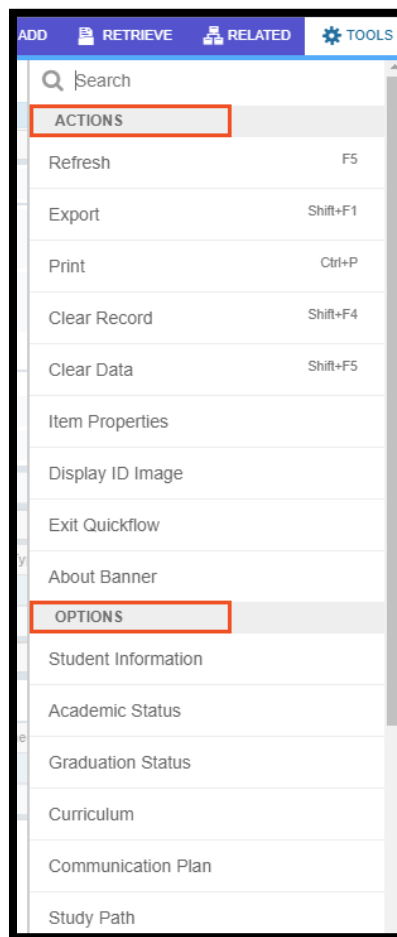
SGASTDN: Tools

The Tools icon is a menu of actions.

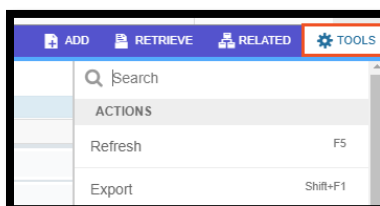
1. Click on the **TOOLS** icon or use the keyboard **Alt+Shift+T**.



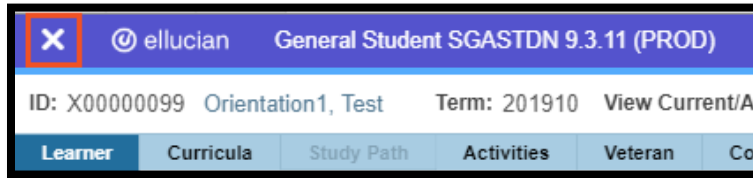
2. Actions and Options will be shown.



3. Click on the **Tools** icon again to close the **Tools** window.



4. Close the SGASTDN page by clicking on the 'X' in the top-left corner or using the keyboard shortcut **Ctrl+Q**.



SOAHOLD Page

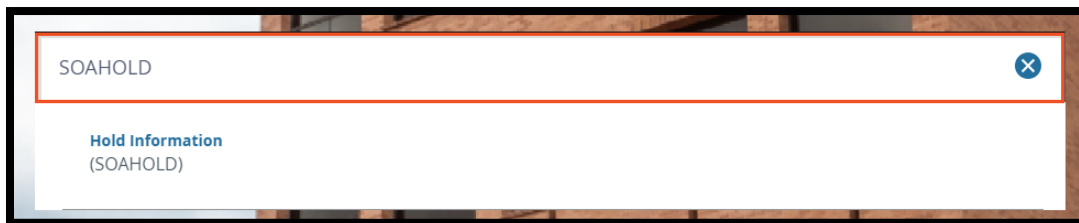
The SOAHOLD (Hold Information) page is used to assign or reviews holds for a person. SOAHOLD codes are used to specify how a person is affected by the hold placed on them. A hold may:

- Prevent registration or graduation
- Production of transcripts
- Enrollment verification documents
- Grade mailers
- Affect admissions applications
- Compliance and Accounts Receivable information

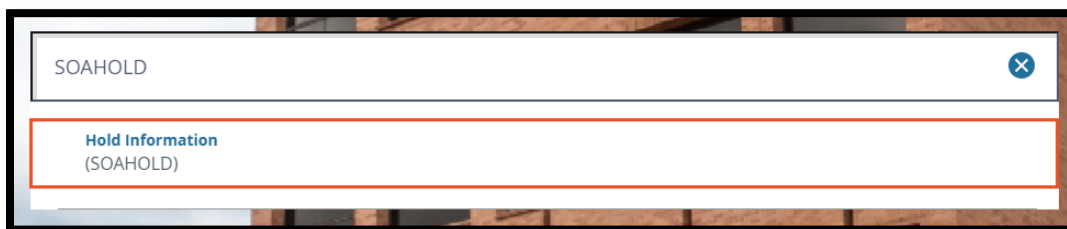
SOAHOLD: Reviewing a Hold

To review a hold:

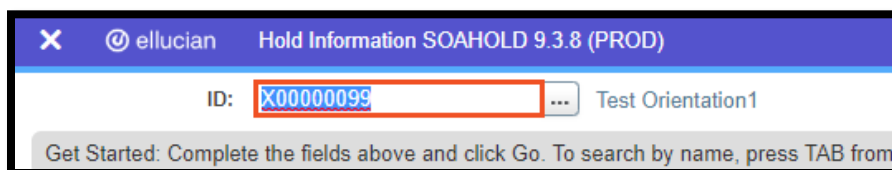
1. In the **Search** bar, enter the page name: **SOAHOLD**.



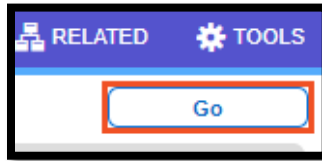
2. Click on the **Hold Information (SOAHOLD)** result.



The test ID X00000099 carried over to the **SOAHOLD** page from the **SGASTDN** page.



3. We will be using the same test ID so click **Go** or use the keyboard shortcut **Alt + PageDown**.



The **Hold Information SOAHOLD** page will be shown.

Hold Information SOAHOLD 9.3.8 (PROD)

ID: X00000099 Test Orientation1

Start Over

Hold Type *	Hold Type Description	Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
CE	CE Advisement Hold	Training Purposes		11/27/2018	11/27/2018			IOF460
CE	CE Advisement Hold			03/29/2016	12/31/2099			RRODRIGUEZ76
CE	CE Advisement Hold			03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76
PL	Account Balance	PL Balance Less Than \$500		05/08/2013	11/08/2013	COMP	Bursar's Office 665-2715	BANWORX
MV	Meningitis Vaccine Hold	Meningitis Vaccine Required		03/18/2013	08/18/2014	ANSS	Admissions/New Studen 665-2999	BANWORX

Record: 1/5

Activity Date 11/27/2018 01:53:54 PM Activity User IOF460

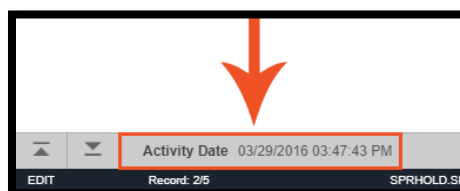
EDIT Record: 1/5 SPRHOLD.SPRHOLD_HLDD_CODE [1]

Notice the hold that is selected (first hold that is highlighted blue). Last **Activity Date** and **Activity User** (date, time, and last user who updated) will be shown in the gray bar located on the bottom of the page.



Moving to a different hold, you will see that the Activity date and time information has changed.

Hold Type *	Hold Type Description	Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
CE	CE Advisement Hold	Training Purposes		11/27/2018	11/27/2018			IOF460
CE	CE Advisement Hold			03/29/2016	12/31/2099			RRODRIGUEZ76
CE	CE Advisement Hold			03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76
PL	Account Balance	PL Balance Less Than \$500		05/08/2013	11/08/2013	COMP	Bursar's Office 665-2715	BANWORX
MV	Meningitis Vaccine Hold	Meningitis Vaccine Required		03/18/2013	08/18/2014	ANSS	Admissions/New Studen 665-2999	BANWORX



SOAHOLD: Inserting a Hold

Please use the test ID provided (X00000099) if you are following this guide and want to test inserting a hold.

To insert a hold:

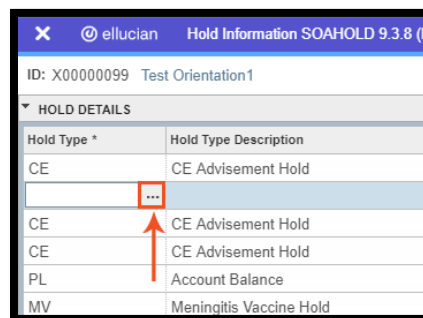
1. Click on **Insert** or use the keyboard shortcut **F6**.



Fields with an asterisk (*) are mandatory and must be filled.

HOLD DETAILS					
Hold Type	Hold Type Description	Reason	Amount	From	To
CE	CE Advisement Hold	Training Purposes		11/27/2018	11/27/2018
				12/12/2018	12/31/2099
CE	CE Advisement Hold			03/29/2016	12/31/2099

2. Click the **Lookup** icon (...) in the blank line.



Hold Type Codes (STVHLDD) window will appear.

Code	Desc	Reg Hold	Env Hold	Trans Hold	Grad
AB	Application Block	Y			
AC	Academic Coaching	Y			
AD	Academic Advising	Y			
AG	Admissions GR Hold	Y			
AH	Advisement Required (Honors)	Y			
AI	Admissions INTL Hold	Y			
AO	Orientation Hold	Y			
AR	Academic Residency	Y			
AT	Call 956-665-7005			Y	

- In the Criteria Search box, type **Advise** (this is just for training purposes. If you work with holds, type whichever description you use).

Code	Desc	Reg Hold	Env Hold	Trans Hold	Grad
AB	Application Block	Y			
AC	Academic Coaching	Y			
AD	Academic Advising	Y			
AG	Admissions GR Hold	Y			
AH	Advisement Required (Honrs)	Y			
AI	Admissions INTL Hold	Y			
AO	Orientation Hold	Y			
AR	Academic Residency	Y			
AT	Call 956-665-7005			Y	

Code	Desc	Reg Hold	Env Hold	Trans Hold	Grad
AH	Advisement Required (Honrs)	Y			
CE	CE Advisement Hold	Y			
US	Univ Scholars Advisement				
VR	Vet Advisement 665-7934	Y			

- Select the code that says **CE Advisement Code** and click **OK**.

Code	Desc	Reg Hold	Env Hold	Trans Hold	Grad
AH	Advisement Required (Honrs)	Y			
CE	CE Advisement Hold	Y			
US	Univ Scholars Advisement				
VR	Vet Advisement 665-7934	Y			

- Entering a reason or comment in the **Reason** field isn't mandatory, but it is a best practice to leave a reason. For Training Purposes, I will enter Training Purposes Manual.

Hold Type *	Hold Type Description	Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
CE	CE Advisement Hold	Training Purposes		11/27/2018	11/27/2018			IOF460
CE	CE Advisement Hold			12/12/2018	12/31/2099			
CE	CE Advisement Hold			03/29/2016	12/31/2099			RRODRIGUEZ76
CE	CE Advisement Hold			03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76

Hold Type *	Hold Type Description	Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
CE	CE Advisement Hold	Training Purposes		11/27/2018	11/27/2018			IOF460
CE	CE Advisement Hold	Training Purposes Manual		12/12/2018	12/31/2099			
CE	CE Advisement Hold			03/29/2016	12/31/2099			RRODRIGUEZ76
CE	CE Advisement Hold			03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76

6. In the **From** field and **To** field leave the default date as is. At the time of this training manual, today's date is (12/12/2018). It may be different depending on the date access this manual.

Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
Training Purposes		11/27/2018	11/27/2018			IOF460
Training Purposes Manual		12/12/2018	12/31/2099			
		03/29/2016	12/31/2099			RRODRIGUEZ76
		03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76
PL Balance Less Than \$500		05/08/2013	11/08/2013	COMP	Bursar's Office 665-2715	BANWORX
Meningitis Vaccine Required		03/18/2013	08/18/2014	ANSS	Admissions/New Studen 665-2999	BANWORX

The **Origination Code** field is not mandatory, but for best practices you should enter an Origination Code, so whoever is reviewing the hold for the student in the future knows who to contact if there is a problem or error.

7. To enter an **Origination Code**, click on the blank field.

Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
Training Purposes		11/27/2018	11/27/2018			IOF460
Training Purposes Manual		12/12/2018	12/31/2099			
		03/29/2016	12/31/2099			RRODRIGUEZ76
		03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76
PL Balance Less Than \$500		05/08/2013	11/08/2013	COMP	Bursar's Office 665-2715	BANWORX
Meningitis Vaccine Required		03/18/2013	08/18/2014	ANSS	Admissions/New Studen 665-2999	BANWORX

8. This will cause the **Lookup** icon to appear. Click on the **Lookup** icon (...).

Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
Training Purposes		11/27/2018	11/27/2018			IOF460
Training Purposes Manual		12/12/2018	12/31/2099			
		03/29/2016	12/31/2099			RRODRIGUEZ76
		03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76
PL Balance Less Than \$500		05/08/2013	11/08/2013	COMP	Bursar's Office 665-2715	BANWORX
Meningitis Vaccine Required		03/18/2013	08/18/2014	ANSS	Admissions/New Studen 665-2999	BANWORX

The Click on the **Lookup** icon (...). table will appear.

9. You can use **right arrow** to browse for codes or you can use the **Criteria** search box to browse for Originator Validation codes.

Originator Validation (STVORIG)		
Code	Description	Activity Date
AAMC	AAM Center 665-7120	11/30/2010
ACAD	Academic Affairs	05/15/2007
ANSS	Admissions/New Studen 665-2999	11/15/2011
AUTO	Generated Automatically	05/15/2007
BACC	BRM ADM_AppAccCampaign	09/27/2011
BACK	BRM ADM_AppAckCampaign	09/27/2011
BAUT	BRM ADM_AppAUTOCampaign	09/27/2011
BMEN	BRM ADM_App Meningitis	10/22/2013
BMIL	BRM ADM_AppMILCampaign	09/27/2011
BNEX	BRM ADM_AppNextCampaign	10/02/2013

Criteria

1 of 3 | 20 Per Page | Record 1 of 53

Cancel OK

10. Because I am a Business Analyst who supports the Registrar office, I will enter **Reg** into the **Criteria** Search. I do not need to type in the entire description, partial description works. Depending on your role/department, this description can be different from the example shown below.

Originator Validation (STVORIG)

Criteria

Code	Description	Activity Date
UNVR	Registrar Office 665-2201	12/19/2011

1 of 1 | 10 Per Page | Record 1 of 1

Cancel OK

11. Click **OK**.

Originator Validation (STVORIG)

Criteria

Code	Description	Activity Date
UNVR	Registrar Office 665-2201	12/19/2011

1 of 1 | 10 Per Page | Record 1 of 1

Cancel OK

12. The **Origination Code (UNVR)** and **Origination Code Description (Registrar Office 665-2201)** was populated into the respective fields.

Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
Training Purposes		11/27/2018	11/27/2018			IOF460
Training Purposes Manual		12/12/2018	12/31/2099	UNVR	Registrar Office 665-2201	
		03/29/2016	12/31/2099			RRODRIGUEZ76
		03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76
PL Balance Less Than \$500		05/08/2013	11/08/2013	COMP	Bursar's Office 665-2715	BANWORX

13. Save changes by clicking on **Save** on the bottom-right corner or using keyboard shortcut **F10**. Click on the day you want.



14. A green window saying Saved successfully (1 rows saved) will appear at the top-right corner of screen.

Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
Training Purposes		11/27/2018	11/27/2018			IOF460
Training Purposes Manual		12/12/2018	12/31/2099	UNVR	Registrar Office 665-2201	IOF460
		03/29/2016	12/31/2099			RRODRIGUEZ76
		03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76
PL Balance Less Than \$500		05/08/2013	11/08/2013	COMP	Bursar's Office 665-2715	BANWORX
Meningitis Vaccine Required		03/18/2013	08/18/2014	ANSS	Admissions/New Studen 665-2999	BANWORX

You will see Activity Date and Activity information for the added hold in the gray footer bar at the bottom of screen.

ID: X00000099 Test Orientation1

▼ HOLD DETAILS

Hold Type *	Hold Type Description	Reason	Amount	From *	To *	Origination Code	Origination Code Description
CE	CE Advisement Hold	Training Purposes		11/27/2018	11/27/2018		
CE	CE Advisement Hold	Training Purposes Manual		12/12/2018	12/31/2099	UNVR	Registrar Office 665-2201
CE	CE Advisement Hold			03/29/2016	12/31/2099		
CE	CE Advisement Hold			03/29/2016	12/31/2099	CONC	Concurrent Enrollment
PL	Account Balance	PL Balance Less Than \$500		05/08/2013	11/08/2013	COMP	Bursar's Office 665-2715
MV	Meningitis Vaccine Hold	Meningitis Vaccine Required		03/18/2013	08/18/2014	ANSS	Admissions/New Studen 665-2999

Activity Date 12/12/2018 05:27:45 PM Activity User IOF460

SOAHOLD: Releasing a Hold

To release a hold, simply change the To field for the hold to the current date.

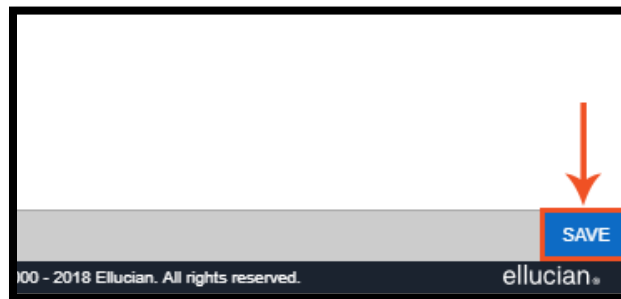
1. Click on the **To** cell for the hold you wish to release.

Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
Training Purposes		11/27/2018	11/27/2018			IOF460
Training Purposes Manual		12/12/2018	12/31/2099	UNVR	Registrar Office 665-2201	IOF460
		03/29/2016	12/31/2099			RRODRIGUEZ76
		03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76

2. Enter in the current date.

Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
Training Purposes		11/27/2018	11/27/2018			IOF460
Training Purposes Manual		12/12/2018	12/12/2018	UNVR	Registrar Office 665-2201	IOF460
		03/29/2016	12/31/2099			RRODRIGUEZ76
		03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76
PL Balance Less Than \$500		05/08/2013	11/08/2013	COMP	Bursar's Office 665-2715	BANWORX
Menigitis Vaccine Required		03/18/2013	08/18/2014	ANSS	Admissions/New Studen 665-2999	BANWORX

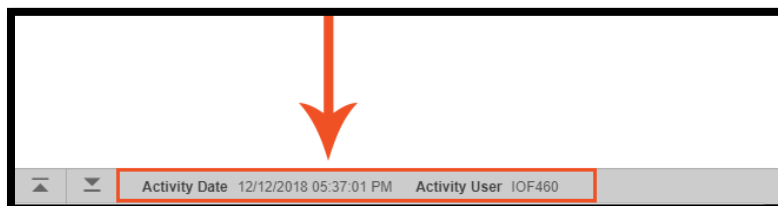
3. Press **Enter** on your keyboard.
4. Click **Save** or use the keyboard shortcut **F10** to save your changes.



5. A green window saying **Saved successfully (1 rows saved)** will appear at the top-right corner of screen.

Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
Training Purposes		11/27/2018	11/27/2018			IOF460
Training Purposes Manual		12/12/2018	12/12/2018	UNVR	Registrar Office 665-2201	IOF460
		03/29/2016	12/31/2099			RRODRIGUEZ76
		03/29/2016	12/31/2099	CONC	Concurrent Enrollment	RRODRIGUEZ76

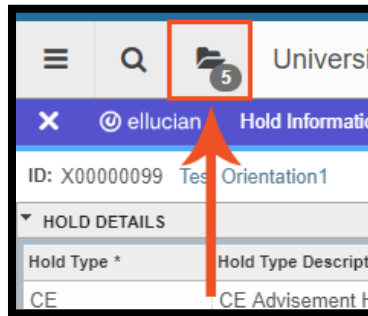
Changes will be documented on the bottom-left corner of screen where it says Activity Date and Activity User.



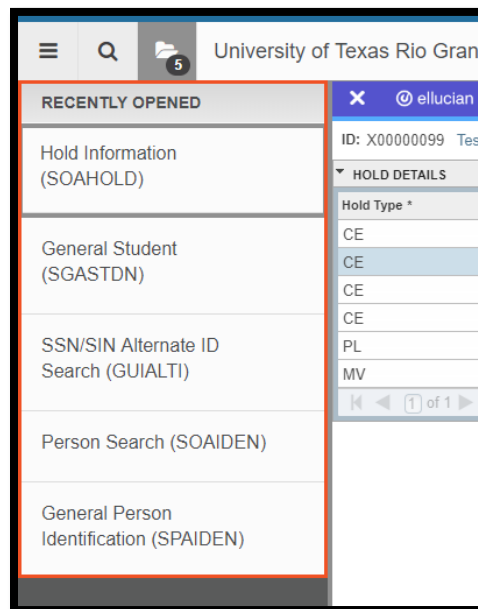
History

Banner 9 keeps a history of recently opened pages. To view history:

1. Click on the **Folder** icon or use the keyboard shortcut **Ctrl + Y**.

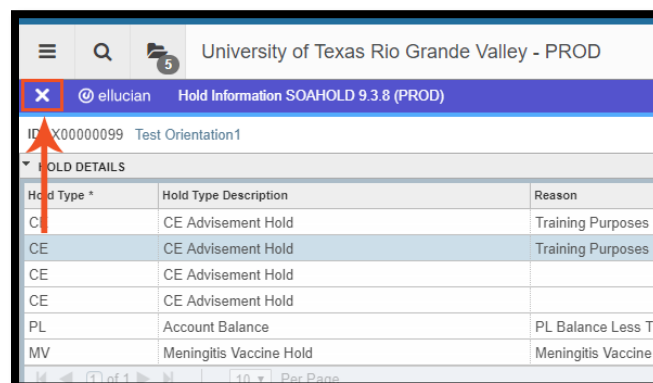


Recently opened pages will be shown.



Clicking on a page will take you to that page without needing to do a search.

2. Close all pages by clicking on the **'X'** or using the keyboard shortcut **Ctrl + Q**.

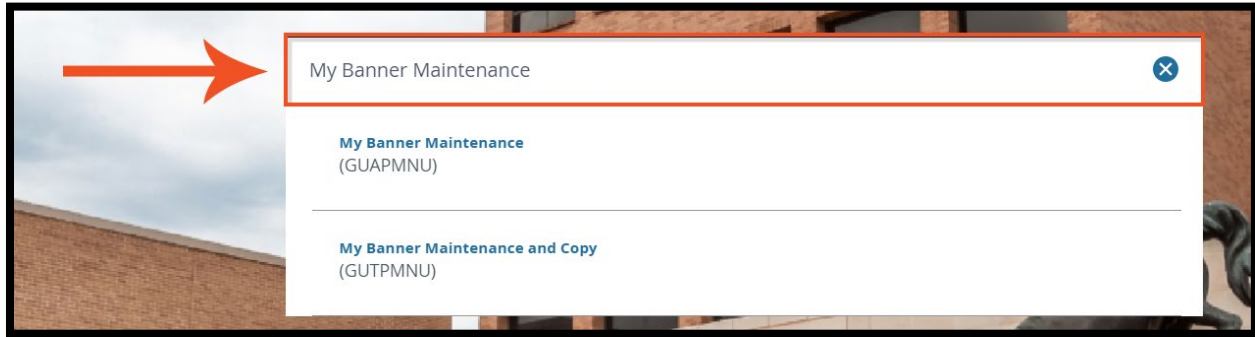


Customizing Your Personal Menu: My Banner

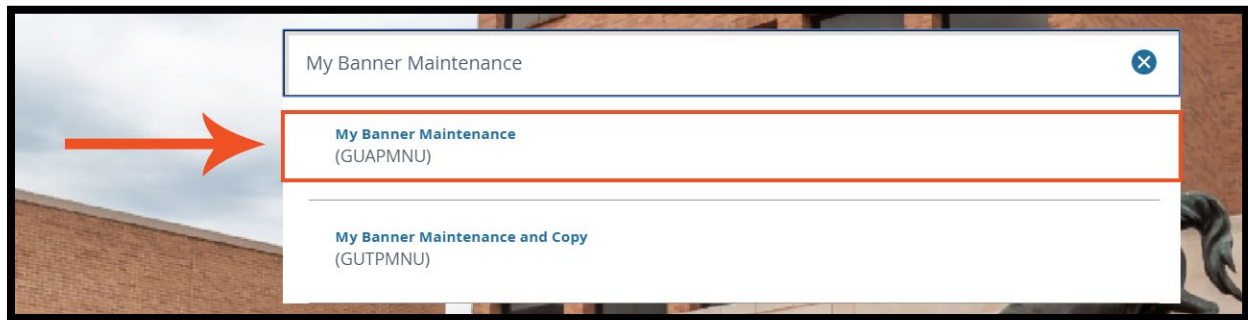
You can create shortcuts to tables and pages you frequently use by using My Banner.

To customize your personal menu:

1. In the **Search** bar, enter **“My Banner Maintenance”** or **“GUAPMNU”**.



2. Select the **My Banner Maintenance (GUAPMNU)** option from the drop-down list of results.

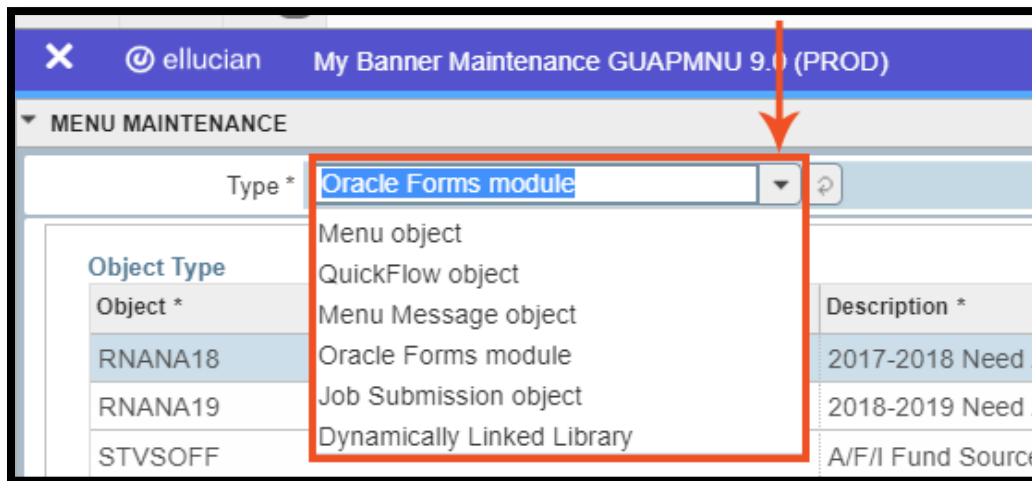


A screenshot of the Banner 9 application interface. The title bar shows 'My Banner Maintenance GUAPMNU 9.0 (PROD)'. The main window is titled 'MENU MAINTENANCE' and contains a table of menu items. A search bar at the top left has 'Oracle Forms module' entered. The table has two columns: 'Object Type' and 'Description'. The first row is highlighted. A search bar on the right is empty. Below the table are buttons for 'Insert Selection', 'Remove Selection', 'Insert All', and 'Remove All'. The bottom status bar shows 'Record 1 of 821' and 'Per Page 20'.

Object Type	Description *
RNANA18	2017-2018 Need Analysis
RNANA19	2018-2019 Need Analysis
STVSOFF	A/F/I Fund Source Validation
STVGSTA	A/F/I Status Validation
STVTASK	A/F/I Task Validation
STVGTYP	A/F/I Type Validation
GUAABOT	About Banner
SSAQCR	Academic Calendar Rule Query
STVACCL	Academic Calendar Type Validation
STVSIZE	Academic Dress Size Validation
STVTYPE	Academic Dress Type Validation
SHQSUBJ	Academic History Catalog Query
SHACTRL	Academic History Control
STVEVEN	Academic History Event Code Validation
SHANCRS	Academic Non-Course
STVASTD	Academic Standing Code Validation
SHASTAT	Academic Standing Query
SHAACST	Academic Standing Rules
SHQASTR	Academic Standing Rules Query
STVACYR	Academic Year Validation

- A. Type – drop down menu showing you the list of Object options:
- Oracle Forms Module
 - Menu Object
 - QuickFlow Object
 - Job Submission Object
 - Dynamically Liked Library.

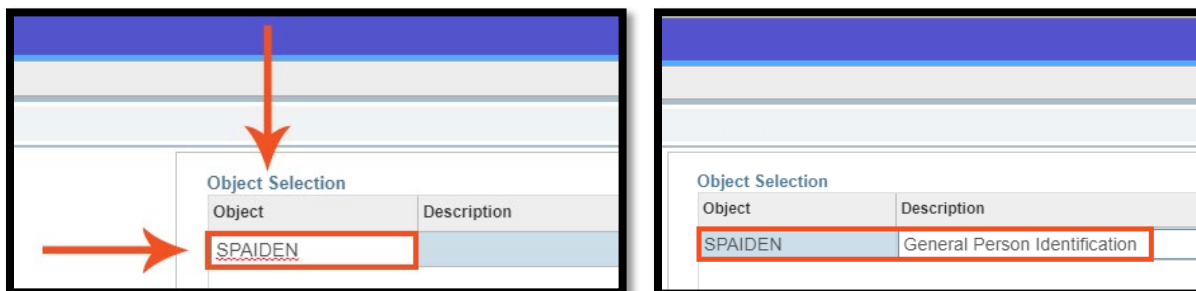
*NOTE: You may need to browse through the object lists to find the specific page you would like to add to your favorites.



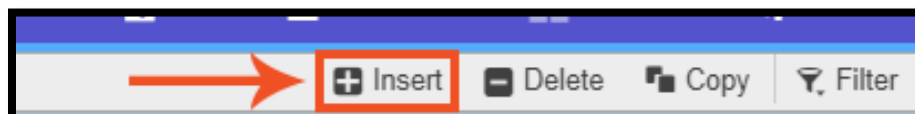
- B. **Object Type:** will show all available pages, jobs, menus or quickflows under the selected Type.
- C. **Add/Remove Buttons:** when an Object Type is selected you can add pages/jobs/etc. to the Object Selection (put into your favorites). Or you can remove page/jobs/etc. from Object Selection (remove from favorites).
- D. **Object Selection:** will show a list of the pages/jobs/etc. you have added to your favorites
- E. **Save:** you need to click on Save to save your selections.

In this example, I am wanting to favorite three pages: **SPAIDEN, SGASTDN & SOAHOLD.**

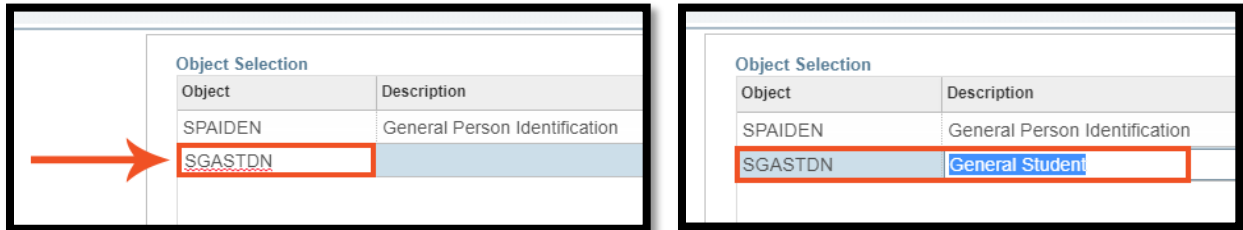
3. In the right table, titled **Object Selection**, enter the text **SPAIDEN** in the blank field and press **Enter** on your keyboard.



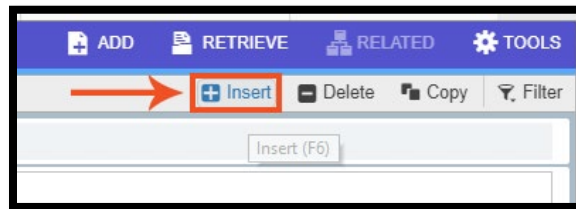
4. To add the **SGASTDN** page, click on **Insert** or use the keyboard shortcut **F6**.



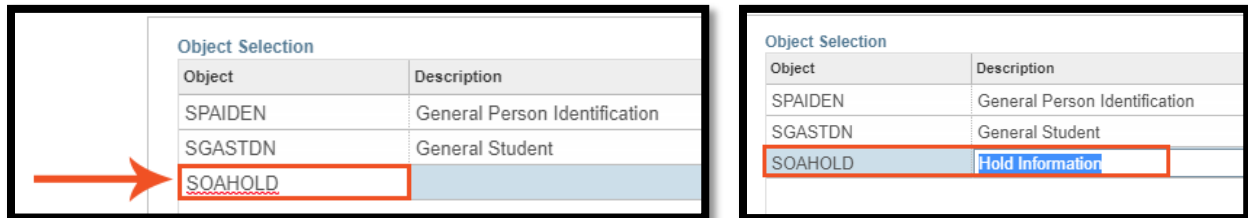
5. Type **SGASTDN** into the new field and press **Enter** on your keyboard.



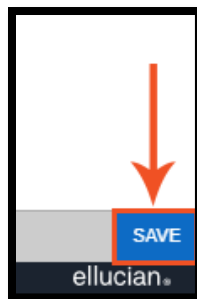
6. To add the **SOAHOLD** page, click on **Insert** or use the keyboard shortcut **F6**.



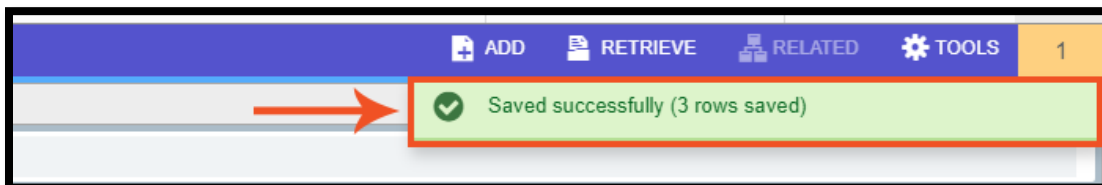
7. Type **SOAHOLD** into the new field and press **Enter** on your keyboard.



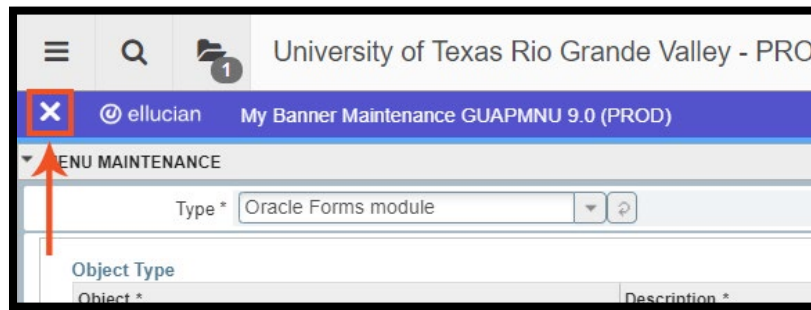
8. Click on **Save** (located at the bottom-right corner of screen) or use the keyboard shortcut **F10**.



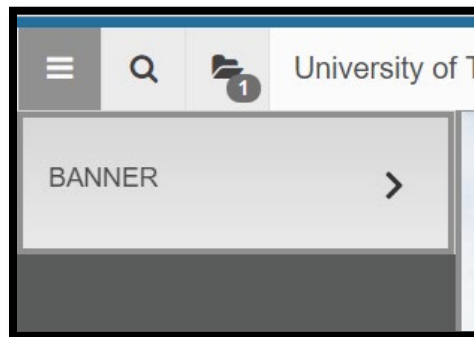
A pop-up message saying Saved successfully (3 rows saved) will be shown.



9. Click the 'X' button to close the **My Banner Maintenance** page.

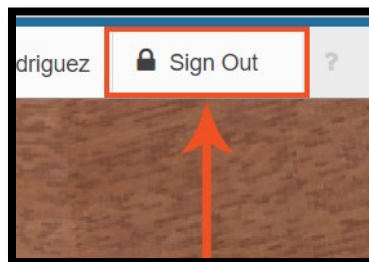


At this time the **My Banner** menu will not show up under **Menu**.

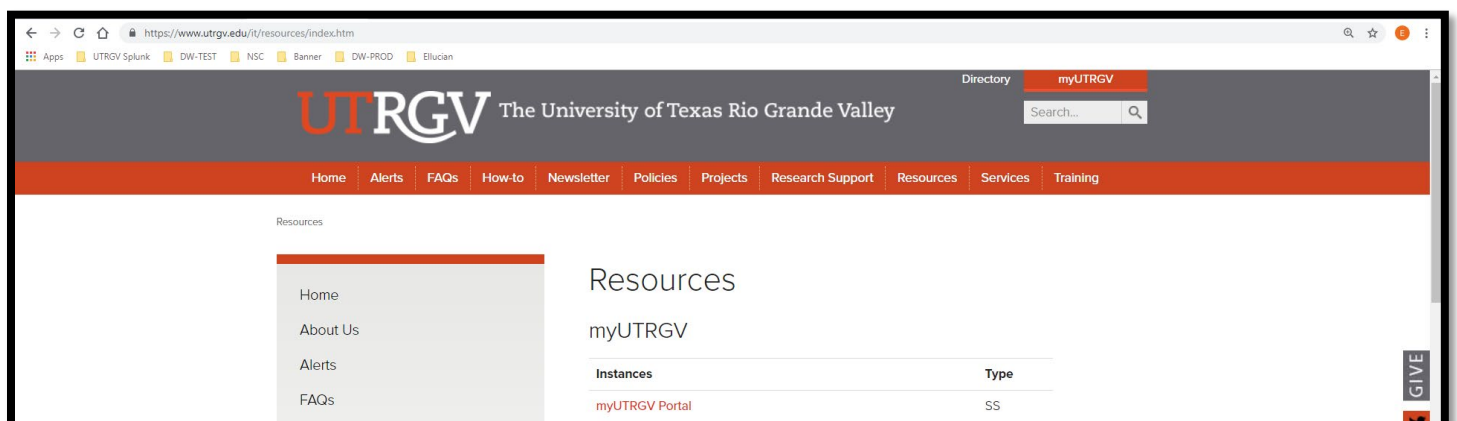


A refresh needs to be done in order to view your changes.

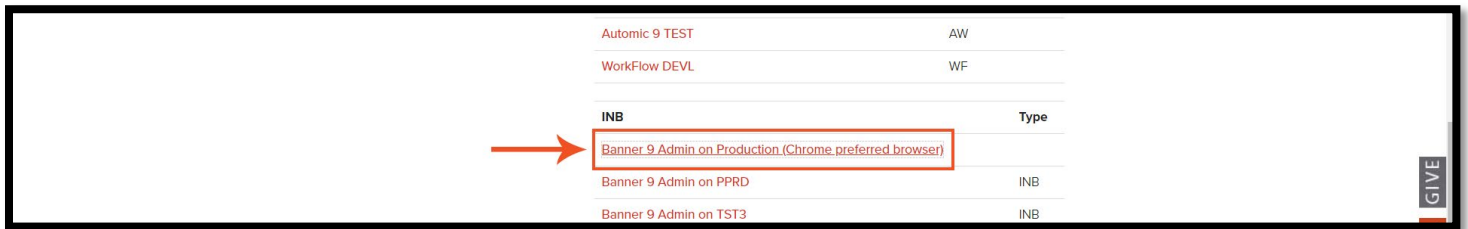
10. Sign out of Banner by clicking on the **Sign Out** button.



You will be taken to the <https://utrgv.edu/it/resources> page.



11. Scroll down the page, and under the **INB** section, click on the **Banner 9 Admin on Production (Chrome preferred browser)** link.

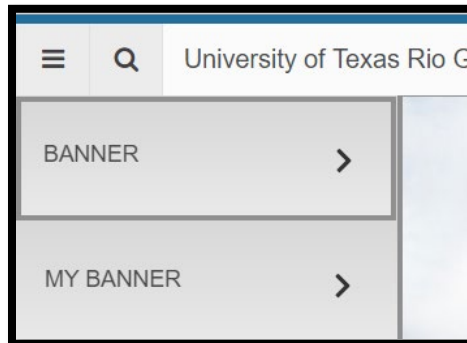


*NOTE: You do not need to sign in again. Since Banner signs you out after 30 minutes of inactivity, and 30 minutes has not passed, you do not need to sign in again.

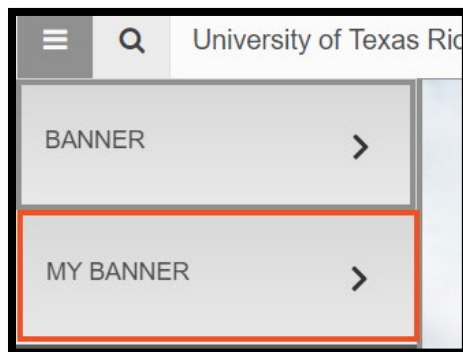
12. Click on the **Menu** icon.



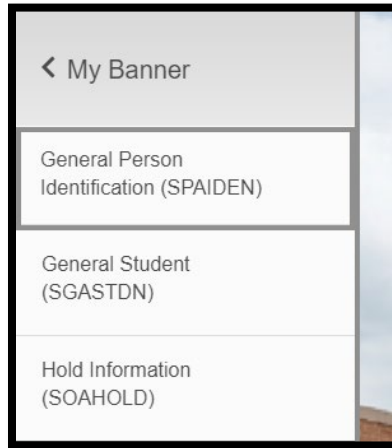
You will now see the **My Banner** menu along with the **Banner** menu.



13. Click on **My Banner**.

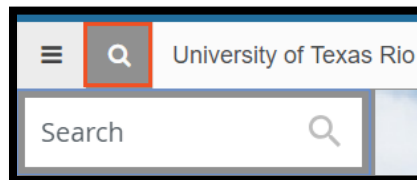


The three pages that were added to favorites are now shown.

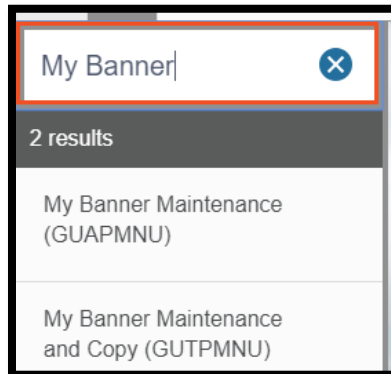


My Banner Menu: Remove Pages from Favorites:

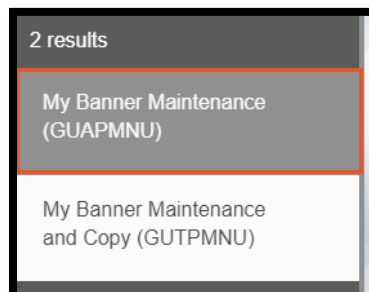
1. Click on the **Search** icon.



2. Enter **My Banner** into the search field.



3. Click on **My Banner Maintenance**.

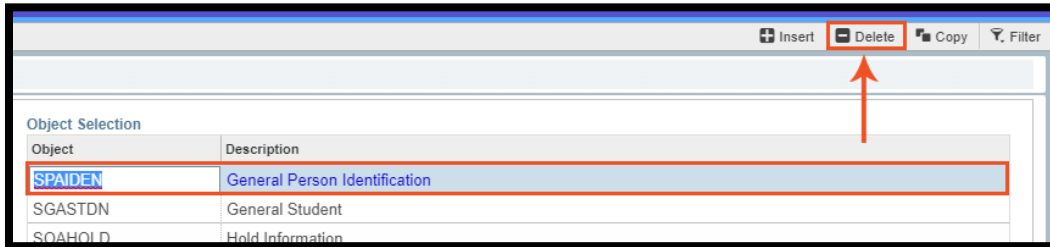


4. Under the **Object Selection** table, double-click one of the pages. In this example, I will double click the **SPAIDEN** page. Selected text will turn blue.



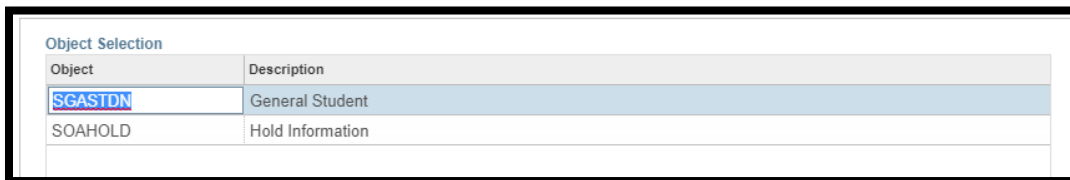
Object	Description
SPAIDEN	General Person Identification
SGASTDN	General Student
SOAHOLD	Hold Information

5. Click on **Delete** or use the keyboard shortcut **Shift + F6**. Click on the **Remove Selection** button.



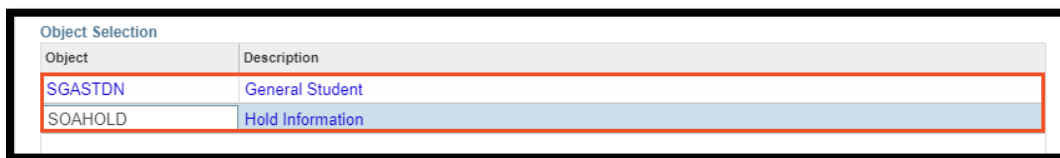
Object	Description
SPAIDEN	General Person Identification
SGASTDN	General Student
SOAHOLD	Hold Information

The SPAIDEN page is no longer listed in the **Object Selection** table.



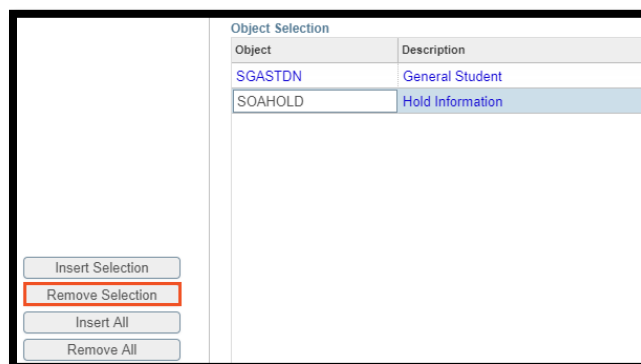
Object	Description
SGASTDN	General Student
SOAHOLD	Hold Information

6. To remove more than one page, double click both pages (SGASTDN & SOAHOLD) until text turns blue.



Object	Description
SGASTDN	General Student
SOAHOLD	Hold Information

7. Click the **Remove Selection** button.



Object	Description
SGASTDN	General Student
SOAHOLD	Hold Information

8. Save your changes by clicking on the **Save** button or using the keyboard shortcut **F10**.



Changes won't take effect until you sign out of Banner again.

QuickFlows

QuickFlows allow you to access a set of pages in a specific sequence. If a change needs to be done for multiple forms, a QuickFlow can be used to update data more quickly and efficiently.

Features of QuickFlows:

- Streamline multi-page processes
- Customizable
- Accessible
 - Once created, QuickFlows are accessible to those who have access to the pages in the QuickFlow and who have access to QuickFlows.

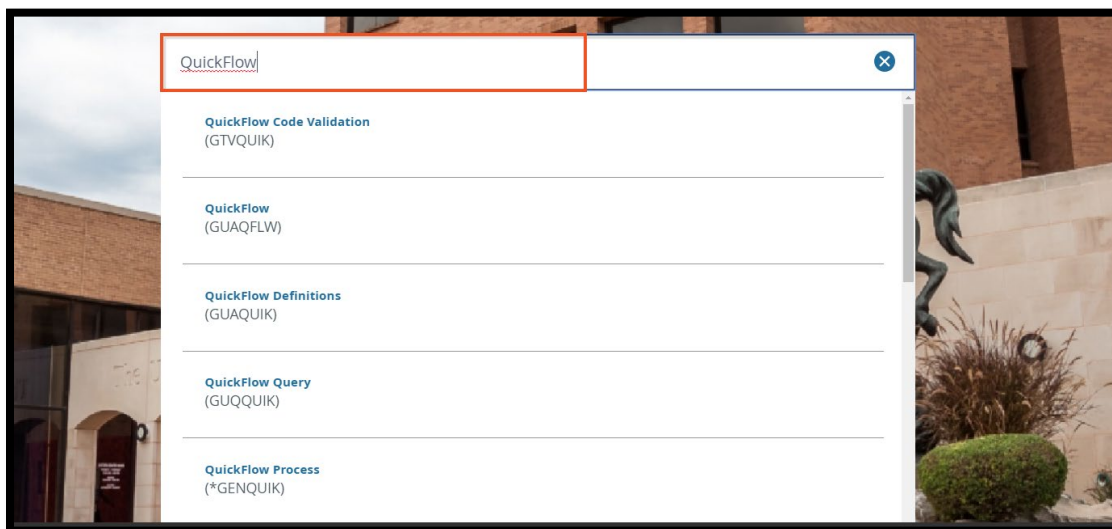
Running a QuickFlow

In this guide, we will be going through an example on how to run a QuickFlow.

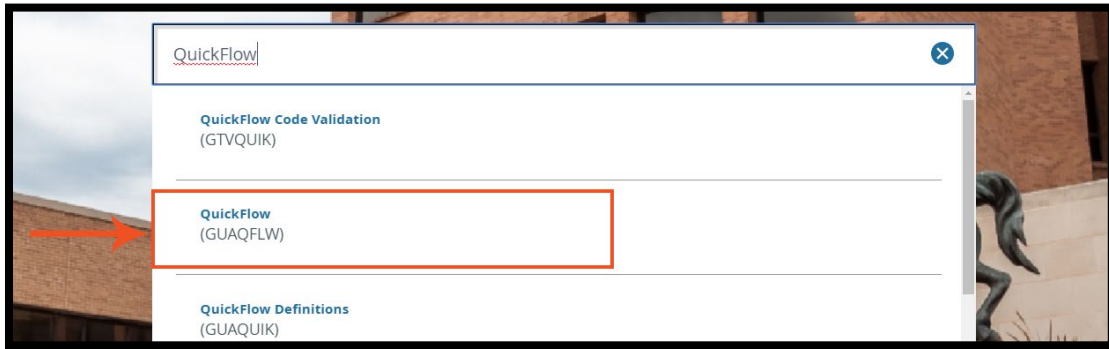
Because this is a training example, do not deviate from guide, and do not save.

To run a QuickFlow:

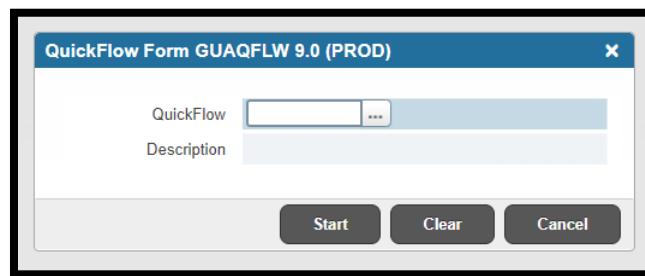
1. In the **Search** bar, type in **QuickFlow**.



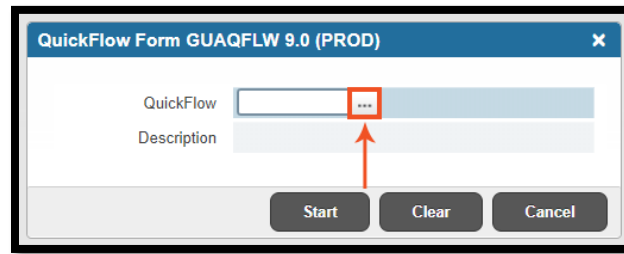
2. Select **QuickFlow (GUAQFLW)**.



The **QuickFlow Form** window will appear.



3. Click the **Lookup icon (...)**.



4. The **QuickFlow Query Page** will appear.

QuickFlow Code	QuickFlow Description
ADM	Admissions List
ADM1UTB	UTB to UTRGV
ADMDUPLICA	Admissions Fix Dup ID
ADMEDITRA	Transfer Articulation EDI
ADMGENERAL	General Information Admissions

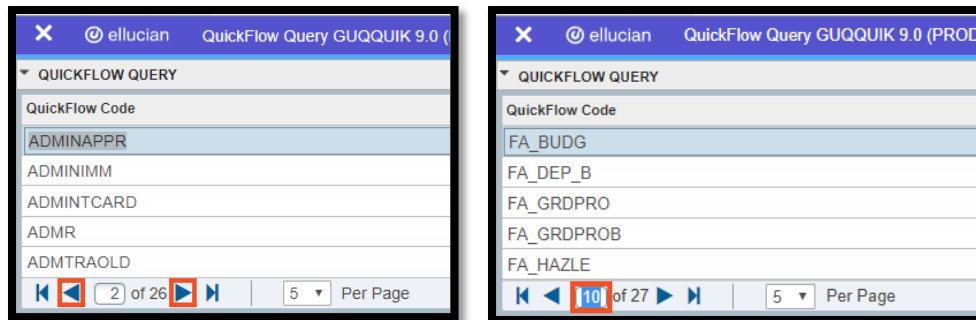
Form Name	Description
SPAIDEN	General Person Identification
SPAPERS	General Person
SOATEST	Test Score Information
SOAHSCH	High School Information
SAAADMS	Admissions Application

- A. List of QuickFlow Codes
- B. List of forms for the selected QuickFlow Code.

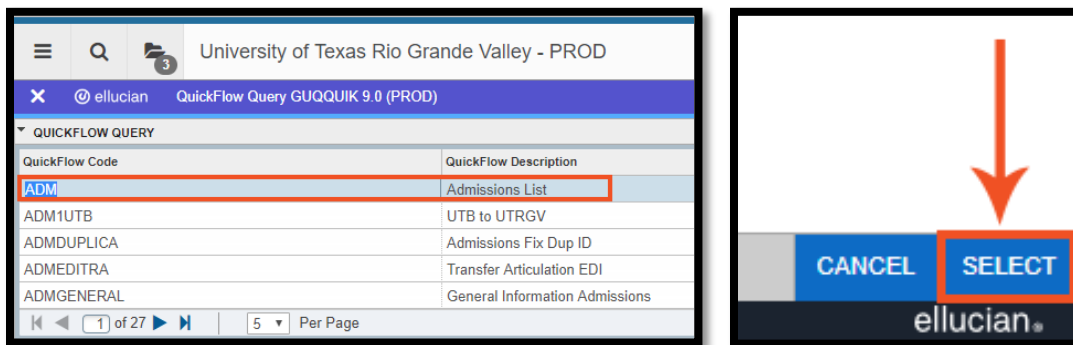
In the example shown in the image above, ADM is the selected QuickFlow Code, therefore the list of forms shown for this QuickFlow are shown under Form Name.

1. SPAIDEN
2. SPAPERS
3. SOATEST
4. SOAHSCH
5. SAAADMS

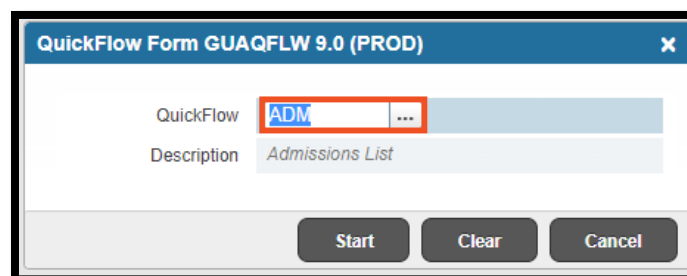
5. Browse through the **QuickFlow Code** options by using the arrows or entering a page #.



6. With the **ADM QuickFlow Code** selected, click the **Select** button located on the bottom-right corner of screen or use the keyboard shortcut **Alt + S**.



The **ADM QuickFlow Code** will be populated into the **QuickFlow** field.



7. Click **Start** to begin the QuickFlow.

QuickFlow Form GUAQFLW 9.0 (PROD)

QuickFlow: ADM

Description: Admissions List

Start Clear Cancel

You will be taken to the first form of the ADM QuickFlow Sequence: **SPAIDEN 9.3.11(PROD) QuickFlow: ADM 1 Of 5**.

ellucian General Person Identification SPAIDEN 9.3.11 (PROD) QuickFlow: ADM: 1 of 5

ID:

8. In the ID field box, enter the following test ID: **X00000096**.

ellucian General Person Identification SPAIDEN 9.3.11 (PROD) QuickFlow: ADM: 1 of 5

ID: X00000096

9. Click **Go** or use the keyboard shortcut **Alt + PageDown**.

RELATED TOOLS

Go

You will be taken to the **SPAIDEN 9.3.11 QuickFlow: ADM: 1 of 5** page for the Test ID queried. You are still in the first of the ADM QuickFlow Sequence.

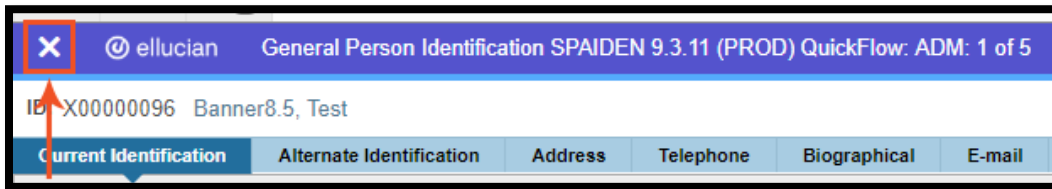
ellucian General Person Identification SPAIDEN 9.3.11 (PROD) QuickFlow: ADM: 1 of 5

D: X00000096 Banner8.5, Test

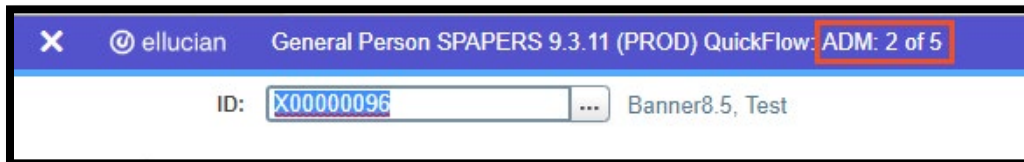
Current Identification	Alternate Identification	Address	Telephone	Biographical	E-mail	Emergency Contact	Additional Identification
IDENTIFICATION							
ID	X00000096						
PERSON							
Last Name	Banner8.5						
First Name	Test						
Middle Name							

Again, because this is just an example on how to run a QuickFlow, no changes will be made to the data.

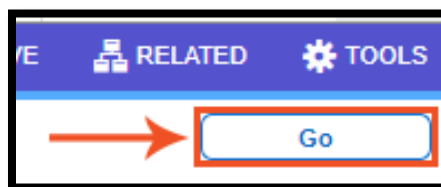
10. Click on the 'X', or use keyboard shortcut **Ctrl + Q**, to close the **SPAIDEN** form and go to go to the next form in the **ADM QuickFlow**.



You will be taken to the 2nd page of the QuickFlow: **SPAPERS 9.3.11 (PROD) QuickFlow: ADM 2 of 5**.



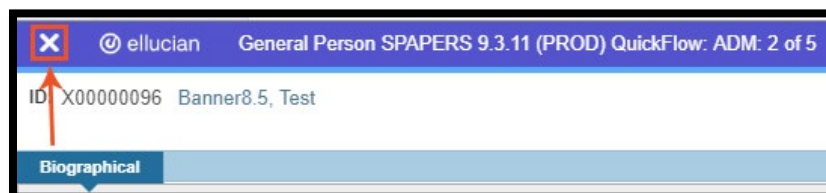
11. Click **Go** or use the keyboard shortcut **Alt + PageDown**.



You will be taken to the **SPAPERS 9.3.11 QuickFlow: ADM: 2 of 5** page which shows Biographical data for the Test ID queried.

Reminder: No changes will be made or saved.

12. Click on the 'X', or use keyboard shortcut **Ctrl + Q**, to close the go to the next form in the ADM QuickFlow.



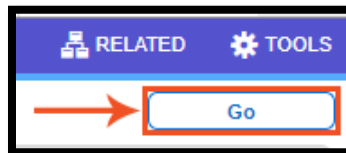
You will be to the 3rd page of the QuickFlow: **SOATEST 9.3.6 (PROD) QuickFlow: ADM 3 of 5**.

ellucian Test Score Information SOATEST 9.3.6 (PROD) QuickFlow: ADM: 3 of 5

ID: X00000096 Banner8.5, Test

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field.

13. Click **Go** or use the keyboard shortcut **Alt + PageDown**.



You will be taken to the **SOATEST 9.3.6 QuickFlow: ADM: 3 of 5** page which shows Test Score data for the Test ID queried.

ellucian Test Score Information SOATEST 9.3.6 (PROD) QuickFlow: ADM: 3 of 5

ID: X00000096 Banner8.5, Test

Test Code *	Description	Test Score *
A01	ACT English	22
A02	ACT Math	17
TAKR	TAKS Reading	1000
A01	ACT English	18
A02	ACT Math	15

Reminder: No changes will be made or saved.

14. Click on the '**X**', or use keyboard shortcut **Ctrl + Q**, to close the **SOATEST** form and go to the next form in the **ADM QuickFlow**.

ellucian Test Score Information SOATEST 9.3.6 (PROD) QuickFlow: ADM: 3 of 5

ID: X00000096 Banner8.5, Test

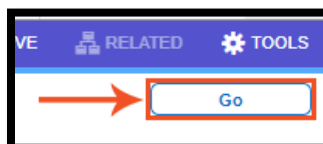
TEST SCORE INFORMATION

You will be to the 4th page of the QuickFlow: **SOAHSCH 9.3 (PROD) QuickFlow: ADM 4 of 5**.

ellucian High School Information SOAHSCH 9.3 (PROD) QuickFlow: ADM: 4 of 5

ID: X00000096 Banner8.5, Test

15. Click **Go** or use the keyboard shortcut **Alt + PageDown**.



You will be taken to the **SOAHSCH 9.3 QuickFlow: ADM: 4 of 5** page which shows High School Details data for the Test ID queried.

The screenshot shows the 'High School Information SOAHSCH 9.3 (PROD) QuickFlow: ADM: 4 of 5' page. The ID is X00000096 Banner8.5, Test. The 'HIGH SCHOOL DETAILS' section includes: High School (032403) St. Xavier's High School, Enrollment Planning, Service Code, Graduation Date (05/31/2013), Transcript Received (06/10/2013), Date, Class Rank and Size (35 / 150), Percentile (77), GPA (3.3), Diploma (D) Distinguished, College Preparation (unchecked), and Admissions Request (HST1) High School Transcript.

Reminder: No changes will be made or saved.

16. Click on the 'X', or use keyboard shortcut **Ctrl + Q**, to close the **SOAHSCH** form and go to the next form in the **ADM QuickFlow**.

The screenshot shows the top of the 'High School Information SOAHSCH 9.3 (PROD) QuickFlow: ADM: 4 of 5' page. The ID is X00000096 Banner8.5, Test. The close button (X) in the top left corner is highlighted with a red box and an arrow.

You will be taken to the **SAAADMS 9.3.11 QuickFlow: ADM: 5 of 5**.

The screenshot shows the 'Admissions Application SAAADMS 9.3.11 (PROD) QuickFlow: ADM: 5 of 5' page. The ID is X00000096 Banner8.5, Test. There is a 'View Current/Active' checkbox and a 'Curricula' section.

17. Enter the Term code **201910** into the Term field.

The screenshot shows the 'Admissions Application SAAADMS 9.3.11 (PROD) QuickFlow: ADM: 5 of 5' page. The ID is X00000096 Banner8.5, Test. The 'Term' field is highlighted with a red box and contains the value '201910'.

18. Click **Go** or use the keyboard shortcut **Alt + PageDown**.

The screenshot shows the bottom of the 'Admissions Application SAAADMS 9.3.11 (PROD) QuickFlow: ADM: 5 of 5' page. The 'Go' button is highlighted with a red box and an arrow.

You will be taken to the **SAAADMS 9.3.11 QuickFlow: ADM: 5 of 5** page which shows the Application data for the Test ID queried.

Admissions Application SAAADMS 9.3.11 (PROD) QuickFlow: ADM: 5 of 5

ID: X00000096 Banner8.5, Test Term: 201910 Fall 2018 View Current/Active Curricula:

Application Curricula Fees, Mail Submission, Withdrawal Data Checklist Sources, Interests, Comments Contacts, Cohorts, Attributes

APPLICATION

Entry Term * 201910 ... Application Number

Application Date

Admission Type ... Full or Part Time ▾

Student Type * ... Outstanding Requirements

Residence * ... Application Status ...

19. To stop running the **ADM QuickFlow**, click on the **Tools** icon and select **Exit Quickflow** from the list of **ACTIONS**.

ADD RETRIEVE RELATED TOOLS

Search

ACTIONS

Refresh F5

Export Shift+F1

Print Ctrl+P

Clear Record Shift+F4

Clear Data Shift+F5

Item Properties

Display ID Image

Exit Quickflow

About Banner

20. Click **Cancel** or click the **'X'** to close the **QuickFlow Form (GUAQFLW)**.

QuickFlow Form GUAQFLW 9.0 (PROD)

QuickFlow ADM ...

Description Admissions List

Start Clear Cancel

Need a QuickFlow Created

If you need a QuickFlow created, talk to the Business Analyst in your team/department so they create can one for you.

If you do not have a Business Analyst in your team/department, go to <https://enrollment.utrgv.edu/enrollmentdata> and submit a request for a QuickFlow.

1. Enter your UTRGV email and password to Sign In.
2. Click on **Submit New Request**.
3. Under **Category**, select **Banner Registrars**.
4. Enter a **Deadline** (by when you want the QuickFlow to be created).
5. In the **Subject** field enter: Requesting Creation of QuickFlow.
6. In the **Request Description** box, enter
 - a. Name of you want for QuickFlow Code
 - b. Description of QuickFlow Code
 - c. Pages and order of pages you want for the QuickFlow.
7. Check the **Send Emails?** box.
8. Click the **Submit Request** button.

UTRGV EnrollmentData

Home **Submit New Request** View Requests Search Requests About

Submit New Service Request

1 Request From: ella.rodriguez@utrgv.edu

2 Request Priority: Medium

3 Category: Banner Registrars

4 Deadline (if any): 02/16/2019

5 Subject: Requesting Creation of QuickFlow

6 Request Description: Name of QuickFlow Code: QUKFLW_EXPLE
Description of QuickFlow: QuickFlow example to be used for potential future trainings.
Pages to be included in QuickFlow:
1. SPAIDEN
2. SGASTDN
3. SOAHOLD

7 Send Emails?

8 Submit Request

Your request has been submitted and you should receive a confirmation email about your request.

All Keyboard Shortcuts

All Banner 9 Keyboard Shortcuts and the corresponding Keyboard Shortcuts are listed below.

Action	Banner 8	Banner 9
Application Navigator		
Access Help	Banner 9 keyboard shortcuts will work in Banner 8 if you are running Banner 8 with Application Navigator and have applied the keyboard shortcut configuration settings.	CTRL+M
Access Menu		CTRL+Y
Display recently opened items		CTRL+SHIFT+L
Search		CTRL+SHIFT+Y
Sign out		CTRL+SHIFT+F
Banner Document Management (BDM)		
Add BDM Documents	Icon or Menu	ALT+A
Retrieve BDM Documents	Icon or Menu	ALT+R
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

Action	Banner 8	Banner 9
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
Open Related Menu	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	CHIFT+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
Submit Workflow	Icon or Menu	ALT+W