This is a reference tool to help you navigate around Banner 9 – Accounts Receivable. As you will experience, the functionality is the same as in the current version with some added features. The overall appearance and layout on some of the forms, however, is quite different.

If you currently use your keyboard to navigate around Banner, be advised that many of the shortcut keys remain the same. However, some did change including the most prominent one, which is moving from one “Block” – now called “Section” – to another. The shortcut has changed from Ctrl + PageDown to Alt + PageDown. A guide to all shortcut keys is available here: Banner 9 Shortcut Keys.

As explained in the email you received, you will need to use either Firefox or Chrome to access Banner 9. You will continue to use Internet Explorer for Banner 8 (INB) forms, which for now is all other forms in Banner, including Student forms (Sxxxxxx), Financial Aid forms (Rxxxxxx), Payroll forms (Pxxxxxx), and Finance forms (Fxxxxxx). In short, you will be going back and forth between two Banner versions and hence two browsers until all Banner modules are upgraded to Banner 9, all of which are scheduled throughout 2018.

In this document, Accounts Receivable forms being reviewed are:

- TSAAREV – Account Detail Review Form - Student
- TSICSRV – Customer Service Inquiry Form
- TSAACCT – Account Review Form - Student
- TGACREV – Cashier Session Review Form

If you require assistance with an Accounts Receivable form not covered in this document, and the first two letters of the form begin with either TS or TG, please contact Daniel Borrego, dborrego@unm.edu, or Patrick Patten, ppatten@unm.edu, in the Bursar’s Office.

Regarding TZIDBAL (the Enrollment Cancellation Balance Query form used only during the first two to four weeks of every semester), it will not be available in Banner 9. We are currently working with UNM IT for a solution within LoboWeb and will send out information about it later.

**ACCESSING BANNER 9**

You can access Banner 9 via this URL, https://lobowebapp.unm.edu/applicationNavigator, or within the MyUNM portal:
Once logged in, you will land at the Welcome Page. From here, you can select the form you want to go to from the Menu or type in the form name:

If you choose to go through the Menu, here is how it looks:
Once you select the form name or type in its name, you will receive the same form (TOADEST) as you do in the current version of Banner. As you do now, simply close the form by selecting the X (or Ctrl + Q on your keyboard).
Form TSAAREV. Once in the form, simply enter the student’s ID in the field – as you do in the current version of Banner – then select the green Go button (or Alt + PageDown on your keyboard).

The next Section should look familiar to you, with some changes in appearance and functionality:
Filtering in TSAAREV. If you want to filter, or search, for a specific transaction or transactions in TSAAREV, then simply click on the Filter button, or hit F7. You will then see this:

From the Add Another Field drop down, select as many fields as you want to include in your search. For example, here we will search for Detail Codes equal to P104 and any Term that contains 2017:

After you've selected Go, your results will appear:

After you've seen your results, you can either Filter Again for a new search or click on the small "X" to the right of Filter Again to go back to the full detail of the student account.
Form TSICSRV. Once in the form, or Section 1, simply hit Go, or Alt + PageDown, to get to the Account Summary, Section 2:

Section 1:

As in the current version in Banner, it’s better to deselect this box on this form. When ready, select Go.

Section 2:

Box was deselected prior to coming into this Section.

You can change the number of transactions shown on the page.

Jump pages by clicking the Arrows or by hitting PageUp or PageDown on your keyboard.
Form TSAACCT, which looks different (horizontal vs. vertical), but provides the same information:

![Form TSAACCT](image)

**Advance to next "Section" by clicking the arrows. Hover over the arrows with your mouse to see keyboard shortcuts.**

You can page through the various Sections by hitting the arrows or by Alt + PageDown.
Form TGACREV. If you are a user who enters transactions onto student accounts (please see TSAAREV above on how to insert a record and save), then you know you must close your Banner Cashier Session at the end of the day. You perform this function in TGACREV. As you do now in the current version of Banner, enter your User Name and make sure the Session Number is 0, then hit Save (button is located in the lower right hand corner of the form or you can simply hit F10 on your keyboard).

Once you have done so, hit the next Section arrow (bottom left) or Alt + PageDown. You will then see this, which is a summary by detail code of the transactions you entered in this session:
If you hit **next Section** again, then you will see this, which is a list of the individual transactions you entered in this session:

![Cashier Session Detail](image)

Once you have confirmed the transactions are correct, **Close your session by clicking on Tools then on Close Session**. Once you hit **Save**, your **Session Number** will change/advance to your next sequential session number.

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