



# SCC Banner 9 Admin Pages Navigation Guide

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## **Solano CC to transition to Banner 9 System**

A new look and feel is coming to the Solano CC student information system, Internet Native Banner (INB or Banner), later this fall. Effective as of January 1<sup>st</sup> 2019, INB will be upgraded campus-wide to a new version called Banner 9.

Ellucian, the software vendor for Banner, has replaced the current form-based platform with a modern web-based platform. As a result, Solano CC along with every other Banner institution, is transitioning to the new Banner 9 system.

### **Why Banner 9**

The Banner 9 project supports the Colleges Strategic Initiative to build a responsive infrastructure for a sustainable campus. The upgrade is a campus wide initiative that completes the improvement of our Banner environment from Banner 8 INB Forms to Banner 9 Admin Pages. In addition, the new user interface provides improved accessibility for all users. Banner 9 eliminates the need for a Java applet for end users, drastically expanding the browsers and platforms that can now access the software. It will deliver a fresh user experience, including all-new tools, and significantly improve our system capabilities across Banner in order to drive new efficiencies so we can focus on our student success.

For more information please visit Banner 9 by ELLUCIAN video link listed below:

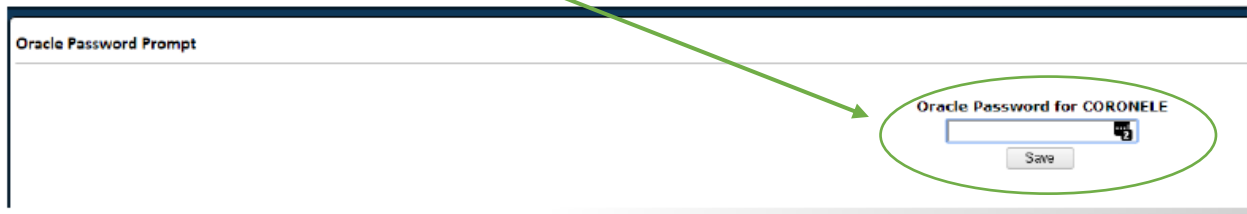
- <https://youtu.be/hfgIccL8xvs>

### **What's new with Banner Admin Pages?**

- Reorganization of the Banner Administrative menu.
- Application Navigator welcome screen offers a “google like” experience for navigating throughout Banner Admin pages, offering multiple ways to search.
- Banner Admin pages are transformed, web page-like versions of INB forms.
- Greatly simplifying the upgrade process for administrators.
- Eliminating users’ browser compatibility problems.

## Using Banner 9

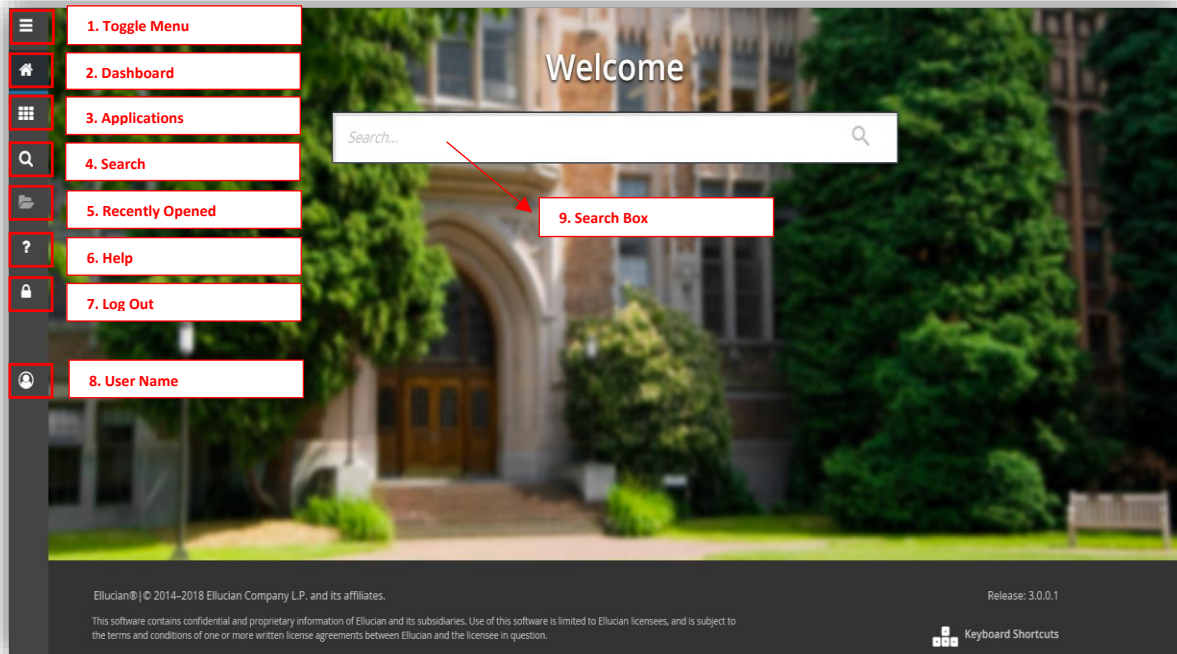
- Banner 8 INB Forms & Banner 9 Admin Pages can co-exist
- Banner 9 works with any web browser – Here at Solano CC we recommend Chrome or Internet Explorer (IE).
  - Should you experience any connection problems – make sure to clear cache/cookies
- Banner 8 forms can still be accessed throughout the transition period
  - But only through IE
  - We recommend to log in on a separate browser and through the Banner 8 menu
- When connecting to a Banner 8 form from AppNav for the first time you will be prompted for your Oracle (Banner) password as shown below:



- WebXtender will not be able to connect directly from Banner 9 forms
  - This is due to SSO
  - We recommend to continue to use Banner 8 forms
  - Or, log in directly into WebXtender
- WebXtender will be upgraded sometime this year at which time it will use SSO and the issue will go away

## Application Navigator

Application Navigator uses single sign-on to provide access to transformed pages during transition from Oracle forms (INB) to a java-based web application (Admin Pages). Application Navigator is used to access Banner administrative applications.



Sign in through MySolano portal and use your credentials to access Application Navigator. You can then use any of the following to navigate within Application Navigator:

1. The **Toggle Menu** icon looks like horizontal lines and it opens and closes the tool bar.
2. The **Dashboard** is home, returning you back to the welcome page as shown above.
3. The **Applications** brings up the banner menu similar to the forms menu in banner 8.
4. The **Search** icon enables searching for a page by either the seven character page name or by the page description.
5. The **Recently Opened** icon will pull up a list of pages opened during the session. You can use these to return to a previous page.
6. The **Help** question mark will bring up banner's online help.
7. The log is the **Log Out** button. Logging out is recommended at the end of any session.
8. **Username** is identifying your record logging into Banner to operate the pages.
9. The **Search Box** is the same as the search icon. It enables searching by page name or description. For example, if you enter Test, then several pages containing the word test will display.

Please note: You can return to the Application Navigator landing page by click on the home button indicated as #2 Dashboard icon.

Online help is available via the “?” icon. This icon is found at the top left hand column of the page. This function allows you more information regarding a selected page or help in using that page.

It is important to remember to use the Sign Out link in the upper right corner when closing the application (instead of just closing your browser) to make sure you are logged out of the application.

### **Why Application Navigator?**

- Oracle will not support forms after December 2018.
- Improved Navigation and Search features.
- No change to self-service WebSmart at this time.
- Java app is not needed, use on any device.
- Adaptive design, i.e., you can expand and contract the size of the page, similar to other windows.
- Runs on any browser, but recommended to use Google Chrome.

## Basic Navigation

The basic navigation of each page (previously Forms) includes the page header, key block, sections, notification center, and buttons.

This screenshot shows a web form titled "General Person Identification SPAIDEN 9.3.11 (TRNG\_12c)". The form is organized into several sections: "IDENTIFICATION", "PERSON", "NON-PERSON", and "ID AND NAME SOURCE". Each section contains various input fields for personal information, including name, address, and contact details. The form also includes a "Start Over" button and a "Filter" option.

## Page Header

This screenshot shows the page header of the "General Student SGASTDN 9.3.7 (FAID)" page. The header includes a "Page Close" button (1), the "Page Title" (2), and buttons for "Add and Retrieve Documents (BDM)" (3), "Related (formerly Options) pages" (4), and "Tools" (5). The "Tools" button is annotated with a list of functions: "EXPORT data", "ITEM Properties", "OPTIONAL", and "Clear Record / Data". A "Go" button (6) is also present. The page title is "General Student SGASTDN 9.3.7 (FAID)".

The page header is part of the basic navigation and contains the following items:

1. The **Page Close** located at the top left is the exit or close icon.
2. The **Page Title** will provide you with the name of the page you're in.
3. The **Add and Retrieve Documents (BDM)** are used with Banner document management. These will be activated later.
4. The **Related (formerly options) pages** button displays a list of pages that can be accessed from this page like the options menu in banner 8.

5. The **Tools** button includes other INB functionality that does not have its own icon. This includes links to other sections of the form, refresh, exporting to a spreadsheet, print, clear record and clear data. Press the Tools button the second time in order to close the drop down.
6. Press the **Go Button** to access the body of the page after the key block data has been entered.

## Page Footer

The screenshot shows a web form titled "FIELD OF STUDY SUMMARY". At the top right are icons for Insert, Delete, Copy, and Filter. Below the title bar is a search bar with the text "Attached to Major Details". The main area contains a table with columns: Priority, Term, Type, Field of Study, Department, and Attached to Major. Below the table are navigation arrows and a "Per Page" dropdown. At the bottom, there is a footer bar with the following information: "Activity Date 11/01/2017 07:59:43 PM", "Activity User P\_Campus SMARTWES", a "SAVE" button, and a status bar showing "EDIT", "Record: 1/7", "SGBSTDN.SGBSTDN\_TERM\_CODE\_EFF [1]", and the user "ellucian".

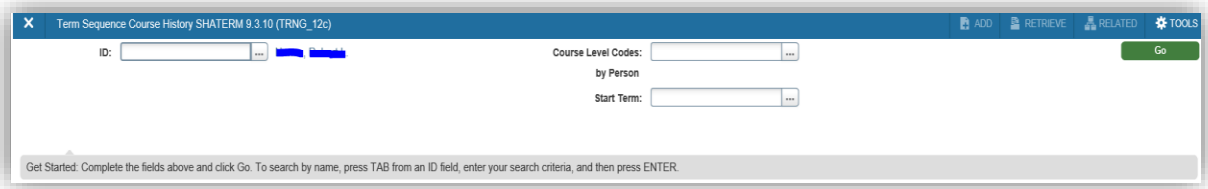
Callouts in the image point to the following elements:

- 1. Previous and Next Section (pointing to the navigation arrows)
- 2. Last Activity Date and Activity User (pointing to the footer text)
- 4. MODE, Record number, and data field name (pointing to the status bar)
- 4. SAVE (pointing to the save button)

1. The **Previous and Next Section** arrows located at the top left allows you to go up and down to the next and previous sections.
2. The **Last Activity Date and Activity User** shows in the page footer
3. The button to **Save** your work is located at the bottom right of the page.
4. The bottom line contains additional information including **MODE** of edit vs. query; The **Record number** in relation to the total number of records; and lastly the **banner data field name** which also displays in the footer.



## Key Block



The first block on most pages contains key information. The key block determines what data is entered or displayed on the rest of the page. All the information on the page is related to the key block. The key block stays on the page as subsequent sections are displayed.

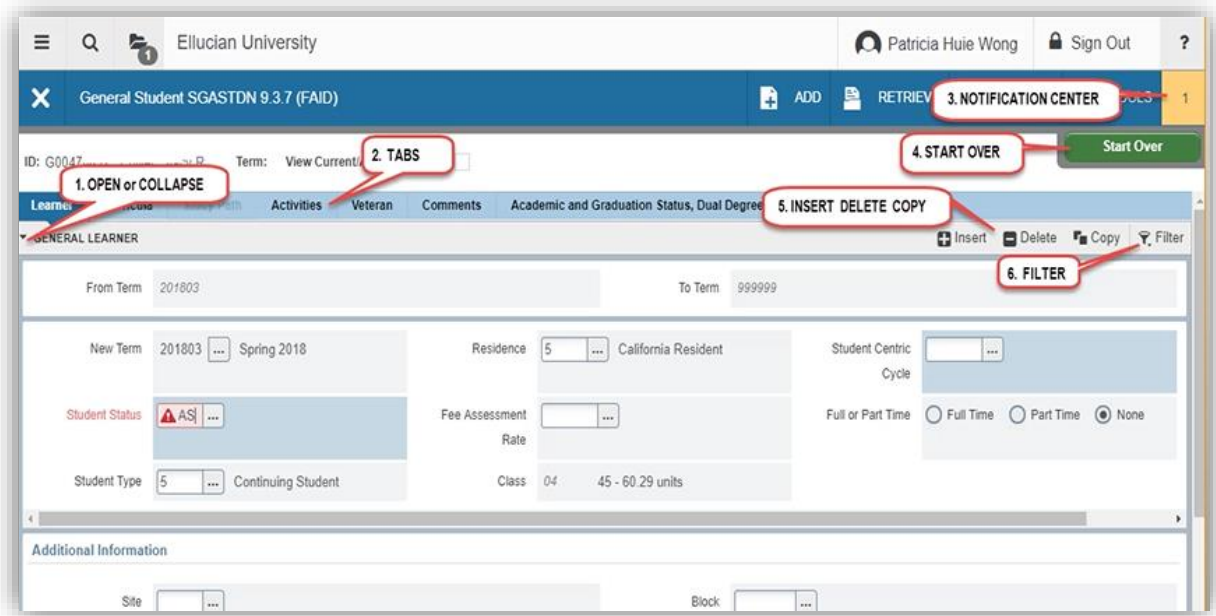
When the cursor is in the key block, the fields that can be entered in the key block are enabled. When you leave the key block, the fields in the key block are disabled.

When the cursor is in the key block, the information is displayed in a column format. When you leave the key block by clicking on the **Go** (previously known as the Next Block) button, the data is rearranged into a linear format and not enterable.

To access the body of the page, populate the key block data and then click **Go**.

You can return to the key block if you are in the body of the page by clicking on **Start Over** (previously known as Rollback).

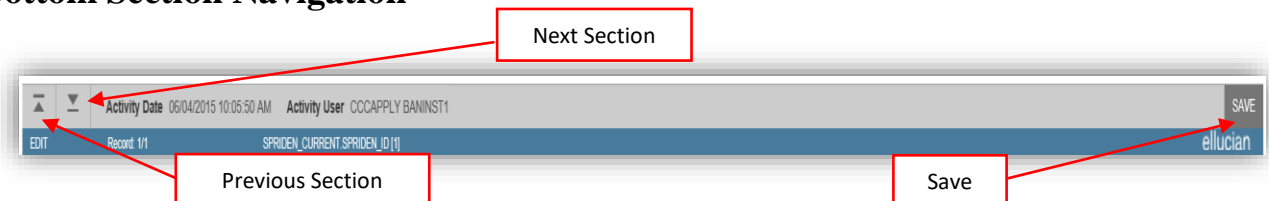
## Sections



Pages are divided into sections (previously known as blocks) that contain additional details for the key information. A Section can represent one record or multiple records depending on the type of information that you are working on. Sections of data are accessed by scrolling up and down the page.

1. The **Open or Collapse** arrows located on the far left side of the header can be opened or collapsed by clicking on the arrow.
2. The **Tabs** icon are available on some pages to access some sections of the group's information.
3. If you receive a **Notification** error message, pushing the notification center button will close the notification.
4. The **Start Over** button returns you to the key block.
5. The **Insert, Delete, and or Copy** buttons are used to insert, delete and copy records.
6. **Filtering** is used to find and limit records based upon search criteria.

## Bottom Section Navigation



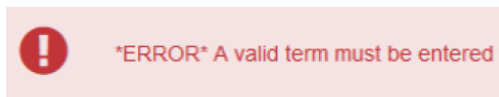
The bottom of the section of the page will contain icons to be used for navigation, perform functions, and display additional information.

- **Previous Section button** – Will take you backwards in the sections (Alt+PgDn)
- **Next Section button** – Will take you to the next section of the page (Alt+PgUp)
- **Activity Date** – Current system time. This would be the time stamped for the record if created or modified.
- **Activity User** – Name of account user creating or modifying the record.
- **Save button** – This is the button you will use to save your data. Error Message Types:

## Notification Center Messages

You may see four message notifications component types when working in Banner 9:

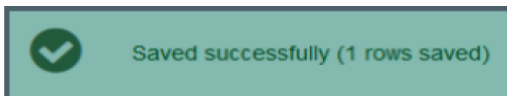
- **Error Notification** – Will display a “!” in a circle when message is displayed.



- **Info Notification** – Will display an “i” in a circle when message is displayed. May display an OK button that you must select to continue.



- **Success Notification** – Will display a checkmark in a circle when message is displayed.



- **Warning Notification** – Will display a “!” in a yield sign when message is displayed. Will also display two buttons, Yes/No, that must be selected to continue.



# Data Display Options

## Required Fields

An asterisk (\*) displayed next to a field name indicates that the field requires a value before you continue on the page. The system uses the definition of the field as it is used in the application to determine if it is required. For fields that have conditional logic that determines whether they are required, the asterisk (\*) is not displayed. If you leave a section or a page without entering information in a required field, the page notifies the individual in the Notification Center, requiring the user to perform some additional action.

## Sort Order

In a grid layout, values for a field can be sorted and, if you chose to sort the data, an up or down arrow next to the field name indicates the current sort order for the field. You can click the field to reverse the sort order.

## Dates

You can either enter the date directly or use the calendar icon for date selection. The date format is mmddyyyy. To enter the current date, type any letter and [TAB].

## Lookup

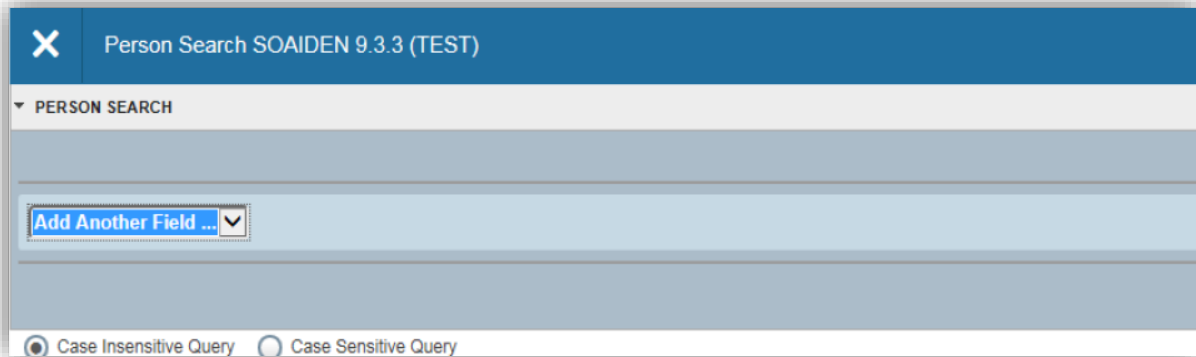
The Lookup feature allows you to quickly find a value for a field. The **Lookup** button next to a field indicates that the field has the Lookup feature.

Click the **Lookup** button (...), enter a filter value, and press **Enter** to display results that match the filter criteria. Select a value and click **OK**, or double-click a value to return the value to the calling page. In addition, when you are in the key block and all you see is the id field, you can press the tab key and this will allow you to enter a name search.

## Filtering Data

You can filter data in a section if there is an active **Filter** icon in the section header. Use the following steps to filter data in a section.

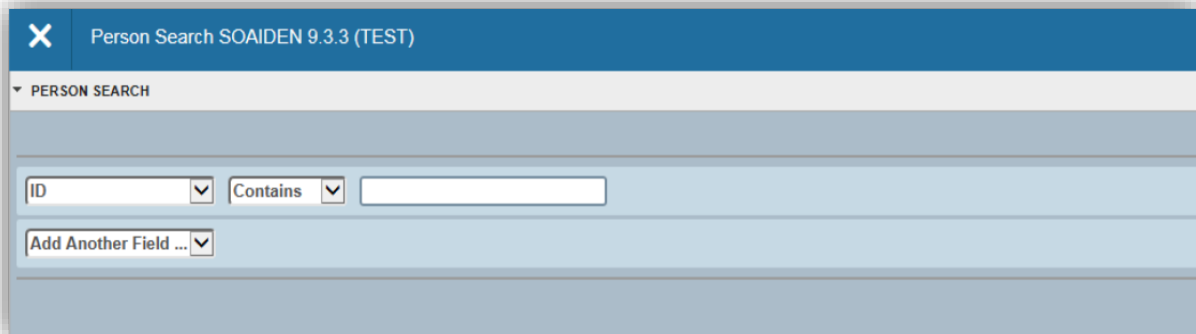
1. Click the active **Filter** (F7) icon for the section.
2. Choose the field you want to filter from the **Add Another Field** drop down list.



The screenshot shows a web application window titled "Person Search SOAIDEN 9.3.3 (TEST)". Below the title bar is a section header "PERSON SEARCH" with a downward arrow. The main area contains a dropdown menu labeled "Add Another Field ..." with a downward arrow. At the bottom, there are two radio buttons: "Case Insensitive Query" (selected) and "Case Sensitive Query".

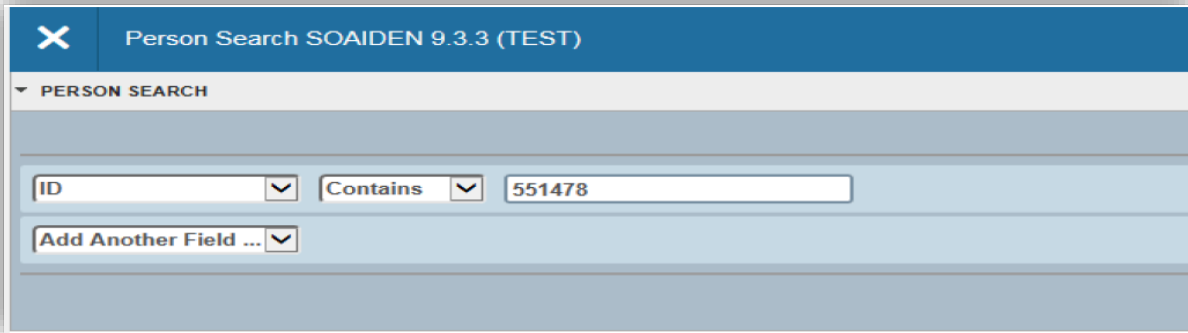
3. Choose an operator from the **Contains** drop down list. The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other).

The **Contains** operator is available for alphanumeric and other fields only. The **Between** operator includes the values entered. For example, for codes “between” 1 and 5, the values 1, 2, 3, 4, and 5 are considered. Required fields do not use the Is Null and Is Not Null operators.



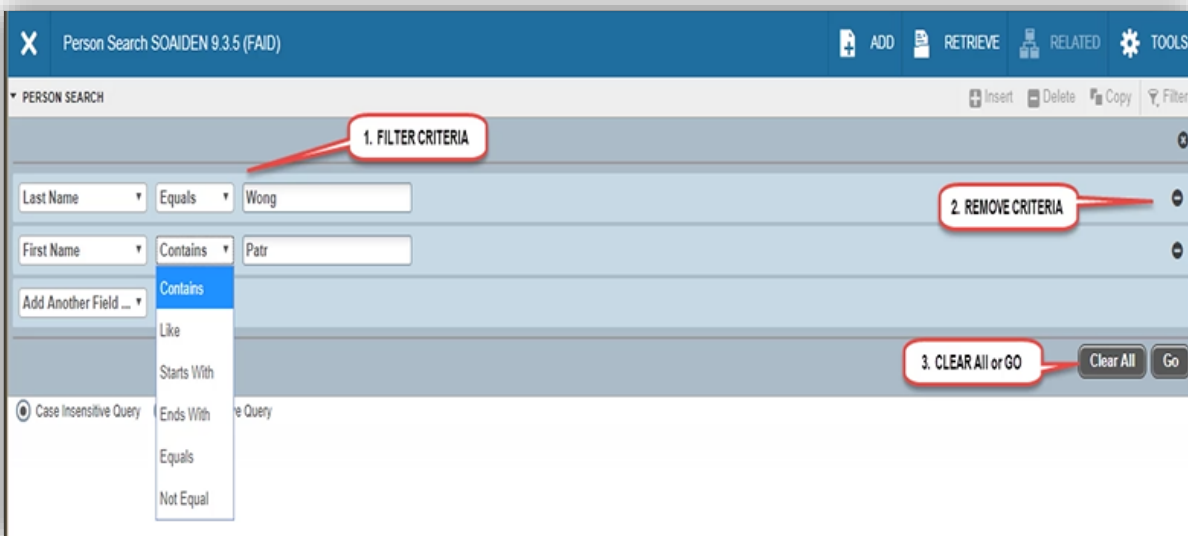
The screenshot shows the same web application window. The "Add Another Field ..." dropdown menu is now open, showing a list of fields. The "ID" field is selected. Below the field list, the "Contains" operator is selected from a dropdown menu. A text input field is visible next to the operator dropdown. The "Add Another Field ..." dropdown menu is still open below the main filter area.

4. Enter a value for the field you selected.



5. **Optional:** If you want to add another field to the filter criteria, choose a field from the **Add Another Field** dropdown, select an operator, and enter a value for the field that you selected. Repeat this step until all filter criteria are entered.
6. When all filter criteria are entered, click **Go** (F8) to display the filter results. The number of records retrieved is displayed at the bottom of the section. The results for a field can be sorted in ascending or descending order by clicking on the field label in the column header. You can reverse the sort order by clicking the field label.
7. **Optional:** If you want to perform another filter, click Filter Again.
8. **Optional:** If you want to close the filter and display all unfiltered records, click the lowercase **x** in the upper corner of the filter window to close the filter.

## Filtering Data Continues...



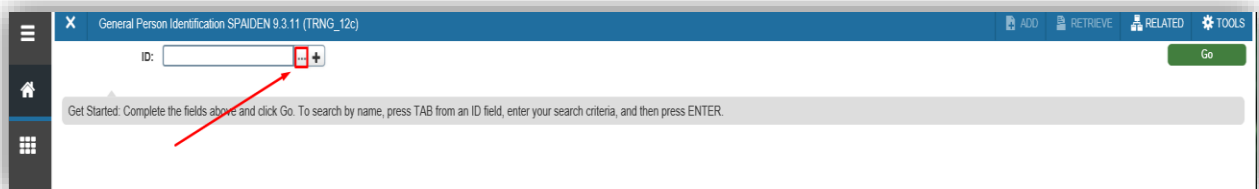
**Filtering** provides the ability to search for specific records. In Banner 8, this was done through the commands of search and execute query.

1. The **Filter Criteria** allows you to person search the user by entering the last and first name of the individual. In addition, the middle drop down filter criteria options allows you to search the name by selecting one of the following options; contains, like, starts with, ends with, equals, and not equal.
2. The **Remove Criteria** will remove or disable the search criteria of that specific filed. For example, if you choose not to enter in the first name of the person and search the last name, you can click on the (-) to disable that search request.
3. The **Clear All** icon will clear the entered work and allow you to start over on your search. The **Go** button will take you to the next sections of the entered information. Please be advised the Go button has replaced the terminology of Banner 8 known as Next Block.

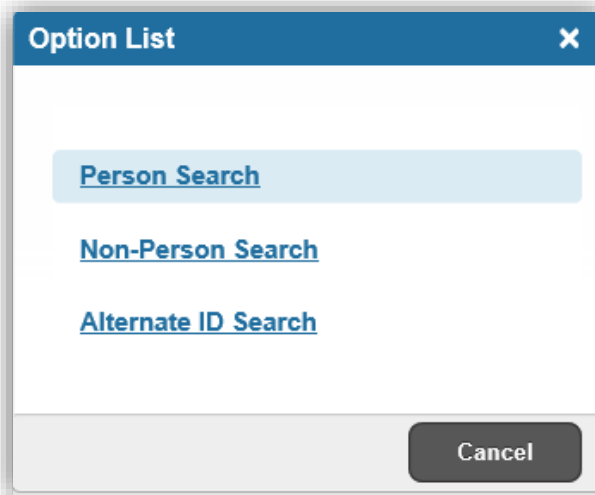
## Wild Card Lookup

When utilizing the Lookup option you may perform either exact match lookups or partial match lookups when some of the information is unknown. To perform a partial match lookup, you will use a “%” to replace the unknown information. For example, when searching for a student with an incomplete ID number, you may enter the known information as 1024245%.

1. Select the lookup icon (...).



2. Choose the type of search to be completed from the option list.



3. Begin the filter process by selecting the appropriate filter. (i.e. ID, Last Name, etc.)
4. Then choose the appropriate operator for the list.

**PERSON SEARCH**

Basic Filter    Advanced Filter

**Add Another Field ...**

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

Last Name    First Name    Middle Name

☒ Case Insensitive Query    ☐ Case Sensitive Query

5. Add any additional filters if any additional information is known. Then select the **Go** button.

Person Search SOAIDEN 9.3.11 (TRNG\_12c)

**PERSON SEARCH**

Basic Filter    Advanced Filter

Enter a query, press F8 to execute.

ID: 1024245%    Last Name: Fraz    First Name: Chris    Middle Name: Selma    Change Indicator: Name Change    Add Another Field ...

ID    Last Name    First Name    Middle Name    Birth Date    Change Indicator    Prefix    Suffix    Name Type

☒ Case Insensitive Query    ☐ Case Sensitive Query

Clear All    Go

6. You will then be provided a list of compatible information and may either highlight the information and use the Select button from the lower right of the form or select Cancel.

**PERSON SEARCH**

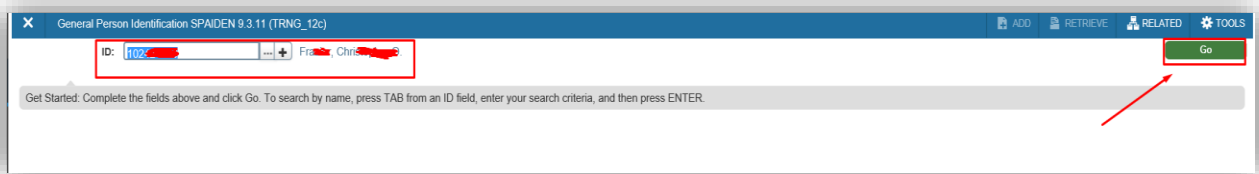
Active filters: ID: 1024245%    Clear All    Filter Again

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
	Fraz	Chris	Selma					CCCA
	Gonz	Jon	Harmon					
	Gonz	Jon	Harmon		Name Change			
	Lew	Mor	Kell					

Record: 1/1    GS\_OPT\_BLOCK.SELECT\_A\_DESC [1]    CANCEL    SELECT    ellucian



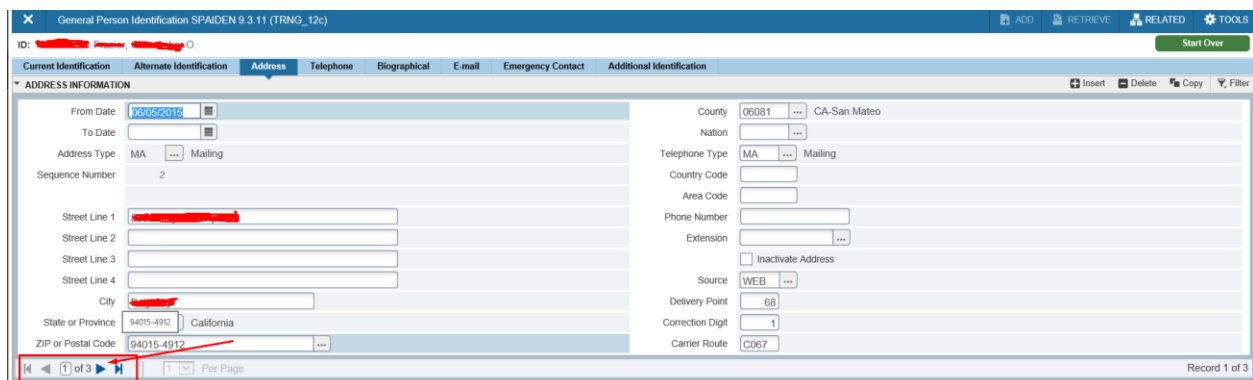
7. The selected information will be returned to the calling page.



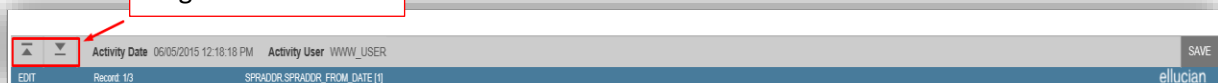
## Multiple Records

Data can exist in multiple records of the same type in the database. For example, addresses are displayed in multiple ways. Records can be viewed one record at a time or in a grid.

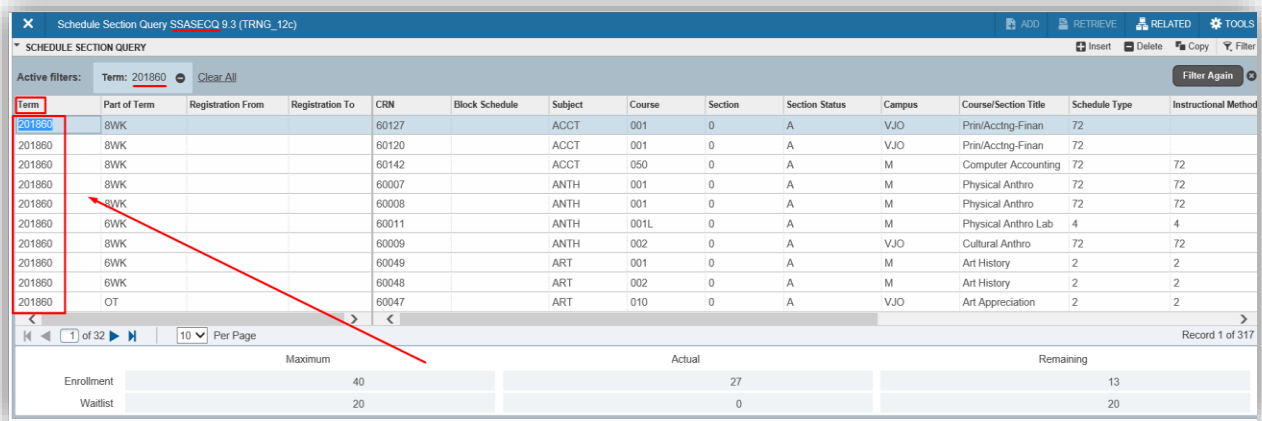
**One record at a time.** In this instance, the details of the data are not displayed in a table grid, but rather in a more easily readable manner. You can move from record to record using pagination controls (the arrows located at the bottom left hand corner).



### Pagination Controls



**In a grid.** In this instance, the data is presented in column and row format. You may need to scroll to view all the data. You can page through records using the pagination controls, decide how many records you want to review in the grid, and sort the data in ascending or descending order by clicking on the arrows next to the column heading.



The screenshot shows a 'Schedule Section Query' window with a grid of course sections. The 'Term' column is highlighted with a red box, and a red arrow points to the first row of data. The grid contains columns for Term, Part of Term, Registration From, Registration To, CRN, Block Schedule, Subject, Course, Section, Section Status, Campus, Course/Section Title, Schedule Type, and Instructional Method. Below the grid, there are summary statistics for Enrollment and Waitlist.

Term	Part of Term	Registration From	Registration To	CRN	Block Schedule	Subject	Course	Section	Section Status	Campus	Course/Section Title	Schedule Type	Instructional Method
201860	8WK			60127		ACCT	001	0	A	VJO	Prin/Accng-Finan	72	
201860	8WK			60120		ACCT	001	0	A	VJO	Prin/Accng-Finan	72	
201860	8WK			60142		ACCT	050	0	A	M	Computer Accounting	72	72
201860	8WK			60007		ANTH	001	0	A	M	Physical Anthro	72	72
201860	8WK			60008		ANTH	001	0	A	M	Physical Anthro	72	72
201860	8WK			60011		ANTH	001L	0	A	M	Physical Anthro Lab	4	4
201860	8WK			60009		ANTH	002	0	A	VJO	Cultural Anthro	72	72
201860	8WK			60049		ART	001	0	A	M	Art History	2	2
201860	8WK			60048		ART	002	0	A	M	Art History	2	2
201860	OT			60047		ART	010	0	A	VJO	Art Appreciation	2	2

Summary Statistics:

	Maximum	Actual	Remaining
Enrollment	40	27	13
Waitlist	20	0	20

## Other Navigation Hints

- Name search can be performed by tabbing through a blank ID field.
- Ellipses “...” next to a field will bring up the drop-down or “list of values.”
- Single and Multiple record icons are on some pages before the “insert” icons on administrative pages to toggle to additional record detail.
- Asterisk “\*” indicates a Required field.
- The Calendar pop-up is available on all dates.

## Conclusion

- Banner 9 pages are Banner 8 forms with a make-over.
- Ellucian is continuing to make changes to the look of the Application Navigator to make pages easier to use.

## Advanced Features

### Item Properties

Item Properties lists all properties for the field where the cursor is currently located.

Item properties include the field’s internal database name, whether the field is required, type of data (character or numeric), maximum length, and other characteristics of the field. The specific properties that are displayed depend on the type of field. To display properties for a field, place the cursor in the field and select **Tools > Item Properties**.

# Appendix

## Buttons

Banner admin pages include several buttons.

Button	Description
Add and Retrieve	Use the Add and Retrieve buttons to interact with Banner Document Management (xTender) to properly store and review documents.
Go	Use the Go button to advance to the body of the page after populating the key block.
Save	Use the Save button to save changes on the page. The Save button is located on the bottom right side of the page.
Section Navigation	Use the Next Section button to navigate to the next section of data. Use the Previous Section button to navigate to the previous section of data. The Next Section and Previous Section buttons are located at the bottom left of each page.
Select and Cancel	Use the Select button to select and retrieve data from a called page to the current page. Use the Cancel button to return to the called page without retrieving any data. When you need to go to a secondary or called page to retrieve data, the Select and Cancel are presented at the bottom of the page.
Start Over	Use the Start Over button to return to the key block of the page.

## Key Terminology Changes

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

Please be advised there are some key terminology changes between Banner 8 INB Forms and Banner 9. These include the following:

- Forms are now called **Pages**
- Blocks become **Sections**
- Next Block is replaced by the **Go Button**
- Rollback is now called **Start Over**
- Querying is now done by **Filtering**

## Shortcut Key Changes Include

Command	Banner 8	Banner 9
Next Block	PgDn →	ALT+PgDn
Previous Block	PgUp →	ALT+PgUp
Record Insert	CTRL+F2 →	F6
Record Remove	CTRL+F3 →	SHIFT+F6
Save	F12 →	F10

In addition, there are some shortcut or hotkey changes that come with Banner 9. These include:

- Next Block becomes **ALT+PgDn**
- Previous Block becomes **ALT+PgUp**
- Record Insert becomes **F6**
- Record Remove becomes **SHIFT+F6**
- Save changes from F12 to **F10**

The list of Banner 9 Shortcut Keys can be found on the Application Navigator Training Handout.

## Banner Keyboard Shortcuts

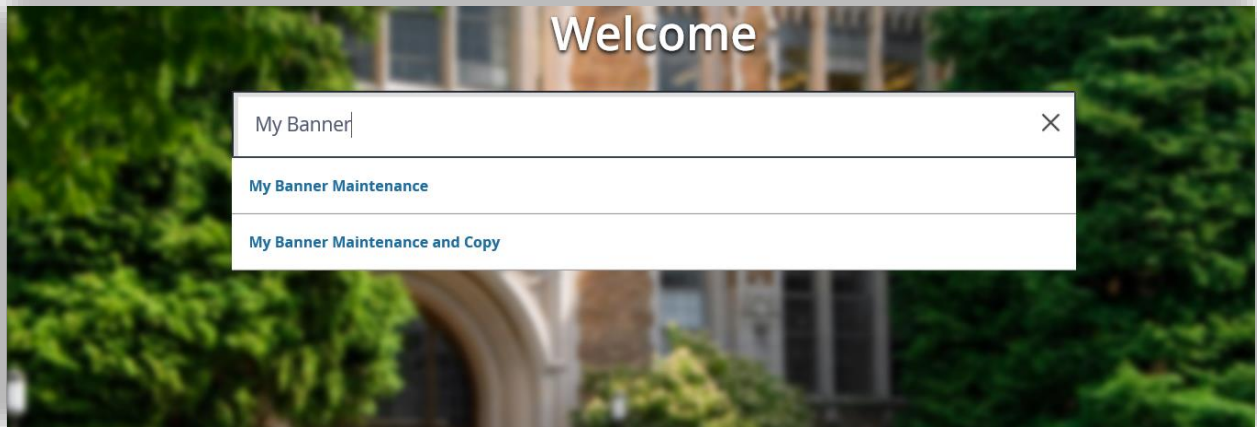
Action	Banner 9 Keystroke	Banner 8 Keystroke
Cancel Page, Close Current Page, or Cancel Search/Query	Ctrl + Q	Ctrl + Q
Change MEP Context	Alt + Shift + C	
Choose/Submit	Enter	Enter
Clear All in Section	Shift + F5	Shift + F5
Clear One Record	Shift + F4	Shift + F4
Clear Page or Start Over	F5	Shift + F7
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	Alt + Down Arrow	Click Field
Export	Shift + F1	Extract Data with Key or Extract Data no Key
First Page	Ctrl + Home	
Insert/ Create Record	F6	F6
Last Page	Ctrl + End	
List of Values	F9	F9
More Information	Ctrl + Shift + U	Alt + H
Next Field or Item	Tab	Tab
Next Page Down	Page Down	Page Down
Next Section	Alt + Page Down	Ctrl + Page Down
Open Menu Directly	Ctrl + M	F5
Open Related Menu	Alt + Shift + R	
Open Tools Menu	Alt + Shift + T	
Page Tab 1 Page Tab 2, etc.	Ctrl + Shift + 1 Ctrl + Shift + 2	
Previous Field or Item	Shift + Tab	Shift + Tab
Previous Page Up	Page Up	Page Up
Previous Section	Alt + Page Up	Ctrl + Page Up
Print	Ctrl + P	Shift + F8
Refresh or Rollback	F5	Shift + F7
Save	F10	F10
Search or Open Filter Query	F7	F7
Select on a Called Page	Alt + S	Shift + F3
Toggle Multi/ Single Records View	Ctrl + G	
Up/Previous Record	Up Arrow	Up Arrow

Workflow		
Release Workflow	Alt + Q	Icon or Menu
Submit Workflow	Alt + W	Icon or Menu
Action		
Banner Document Management	Banner 9 Keystroke	Banner 8 Keystroke
Add BDM Documents	Alt + A	Icon or Menu
Retrieve BDM Documents	Alt + R	Icon or Menu
Application Navigator		
App Nav - Access Help	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	

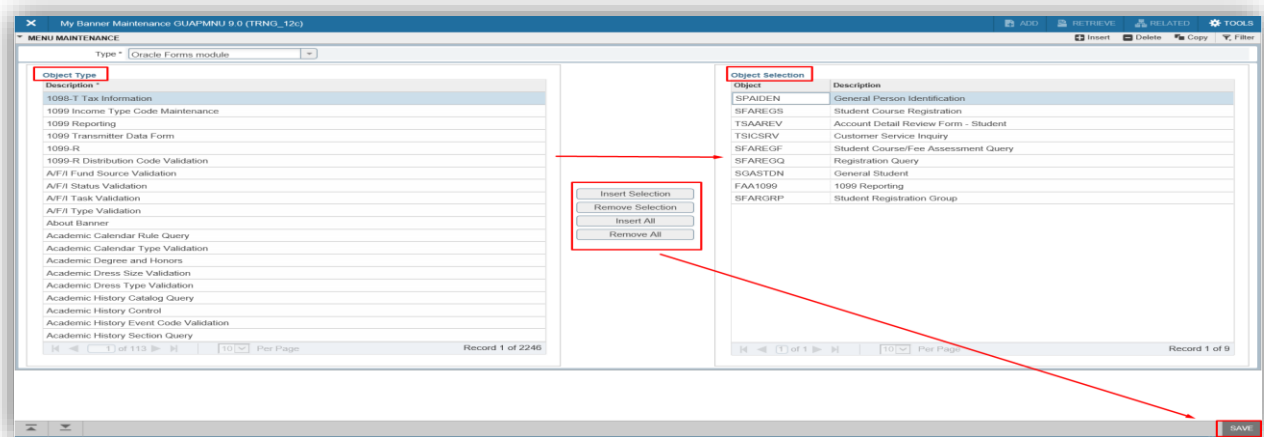
## My Banner Personal Menu

You may create a personal menu tied to your Banner user ID. Your personal menu will contain the pages, jobs, menus, and Quickflows that are most important in your daily work. Once the personal menu is created, you may access it from the main menu.

1. From the Application Navigator page, use either the search box in the middle of the screen or the search icon to enter either “My Banner” or “GUAPMNU.”

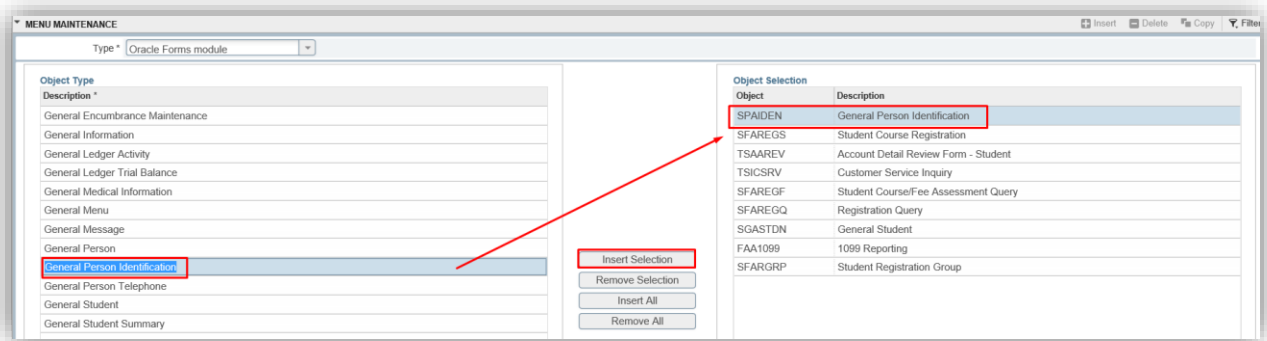


2. The My Banner maintenance page contains:
  - Type: A drop down menu located at the top of the screen allows you to choose from Oracle Forms, Job submission, Menus, Menu Messages, and Workflows to access all forms needed to customize your My Banner.
  - Objective Type: All available pages, jobs, menus, or quickflows associated with the chosen type selected from the drop down menu.
  - Buttons: Buttons are used to insert or remove selections from the available list to your My Banner list.
  - Objective Selection: Will display the contents of your personal menu.

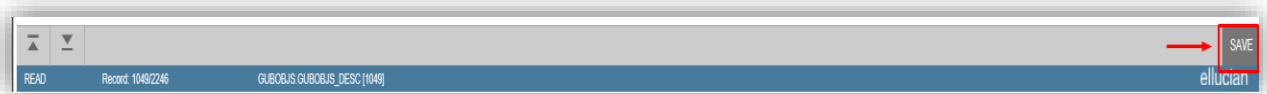




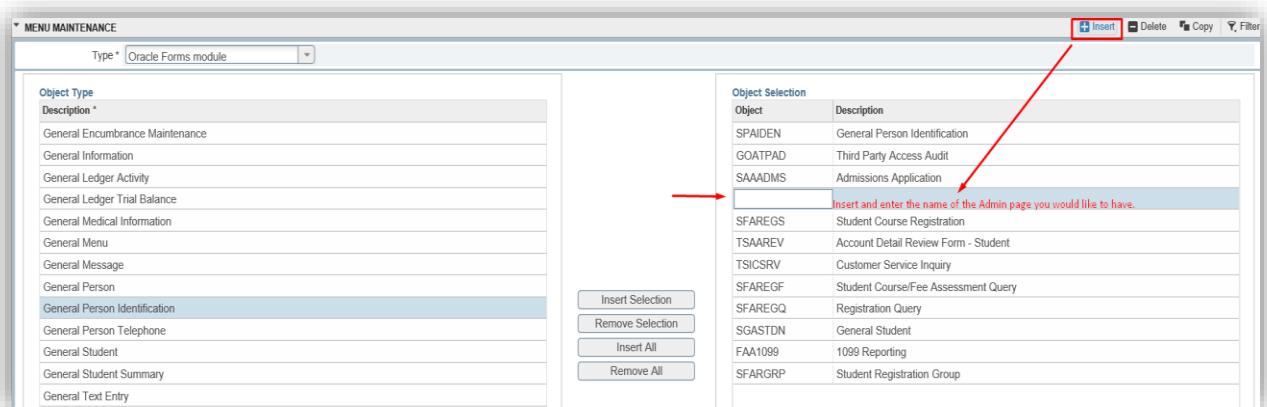
3. To add objects to your personal menu, select the name from the left pane by double clicking it and then use the insert buttons in the middle of the screen to add to the right pane.



4. After each page selection to the right pane, select “Save” in the bottom right hand corner to retain selections.



5. Shortcut to creating your My Banner list: Beginning with the Object Selection panel (the right panel), select the first open record. This is displayed as a box with a cursor available. Enter the seven character page and arrow down to create the next record. You may enter as many pages as you wish. Remember to select Save before exiting the page.



6. Please note: You will have to sign out and sign back in to see changes on your My Banner.

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## **NOTE:**

This is a developing document and  
will update at any time.