SOU Banner 9
Navigation Guide

Draft 11.29.2018

Contents

Introduction

Banner 9 is a major upgrade to the Banner System. According to Ellucian, "Banner 9 by Ellucian is no ordinary upgrade. It delivers a fresh user experience, all new tools, and significantly improved capabilities across Banner, driving new efficiencies so you can focus on student success."

Banner 9's new user interface, known as Application Navigator or App Nav, replaces underlying Banner 8 technology that is being phased out, including Oracle Forms, and eliminates the need to run Java (JRE) in the browser.

Some of its many new advantages include:
- Eliminating users' browser compatibility problems
- Ending dependency on Internet Explorer and allows for full browser support (Chrome, Firefox, Safari, MS Edge)
- Greatly simplifying the upgrade process for administrators What's new with Banner Admin Pages?

What's new with Banner Admin Pages?
- Application Navigator welcome screen offers a "google like" experience for navigating throughout Banner Admin pages, offering multiple ways to search.
- Reorganization of the Banner menu.
- Banner Admin pages are transformed, web page-like versions of INB forms

---

Application Navigator

Login to Banner 9 Application Navigator on the Intranet Banner login page using either browser, Internet Explorer (Windows) or Safari (Mac). In the future, Banner 9 will function in any web browser.
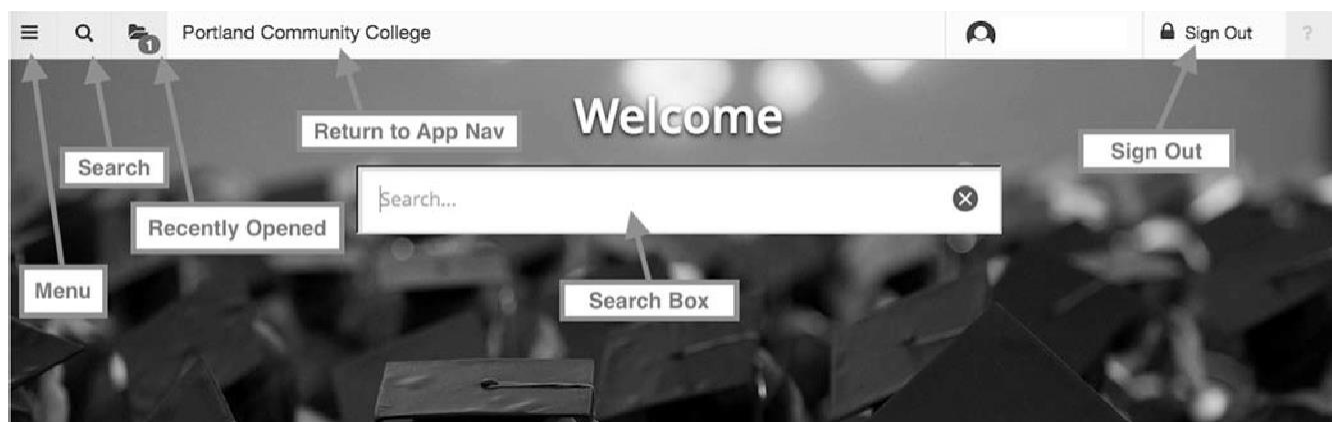
- **Menu icon (CTRL+M)**
  The Menu icon is located in the upper left corner of the application.

Click on this icon to open the Banner Menu to find the page you are interested in opening. Select the desired entry and click Enter.

The Menu icon will also allow you to open the My Banner menu which will allow you to create a personal list of pages that you use regularly.

- **Search icon (CTRL+Shift+Y)**
  The Search icon is located in the upper left corner, just to the right of the Menu icon.
  Click on this icon to open the Search window.
  You can enter either the descriptive name of the page or the Banner acronym for the page.
- **Recently Opened icon (CTRL+Y)**
  The Recently Opened icon is located in the upper left corner, just to the right of the Search icon. It is displayed with a count of pages after you have opened the first page in an application. Open the list and select a page to access it.
- **Search box in the center of the page**
- In this box, you can enter either the descriptive name of the page or the Banner acronym for the page. Find the desired entry and click Enter.
- **Return to the Application Navigator landing page** by clicking on the Portland Community College link whenever you are in any other page.
- 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.

Note: On-line help is available via the **"?"** icon, however, it is generic in nature and not specific to PCC's business processes.

Application Navigator has a set of keyboard shortcuts, which you can review by clicking on **Keyboard Shortcuts** in the bottom right corner of the page. See the appendix for a full list of Keyboard Shortcuts.

Basic Navigation

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

Page Header

The page header is part of the basic navigation and contains the following items:
- Page close icon "X" – Always use this icon to close your page.
- Page title – Includes description, acronym, version, and database.
- Related Menu button – Displays a list of pages that can be accessed from this page.
- Tools Menu – Will include refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.
- Notification Center – Will be located to the right of the Tools Menu and will display the following information as needed: successful save of data, warning messages, error messages, informational messages, number of messages to be corrected to continue in the page. You can click in the box with the number in the page header to open or close the Notification Center.

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 the Go (previously 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 a page by clicking Start Over (previously Rollback).

Sections

Pages are divided into sections (previously 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. Each section contains related information. Sections of data are accessed by scrolling up and down the page. They can be opened or collapsed by clicking on the arrow on the far left side of the section header. Some sections are accessed by using tab headings that group information in a meaningful way.

If available, the sections can have a header that includes icons for the following actions:
- Insert – Use this to insert records in the section.
- Delete – Use this to delete records in the section.
- Copy – Use this to copy records in the section.
- More Information – This icon will only appear if supplemental data can be entered for the record. The icon is displayed with a check mark if supplemental data already exists for the record.
- Filter – Use this to filter records in the section.

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+ Page Up).
- **Next Section button** – Will take you to the next section of the page (Alt+ Page Down).
- **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 the button you will use to save your data.

Notification Center Messages

You may see four message notification 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 have chosen 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 label 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 on your keyboard.

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

Filtering replaces the Query feature of Banner 8.
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.
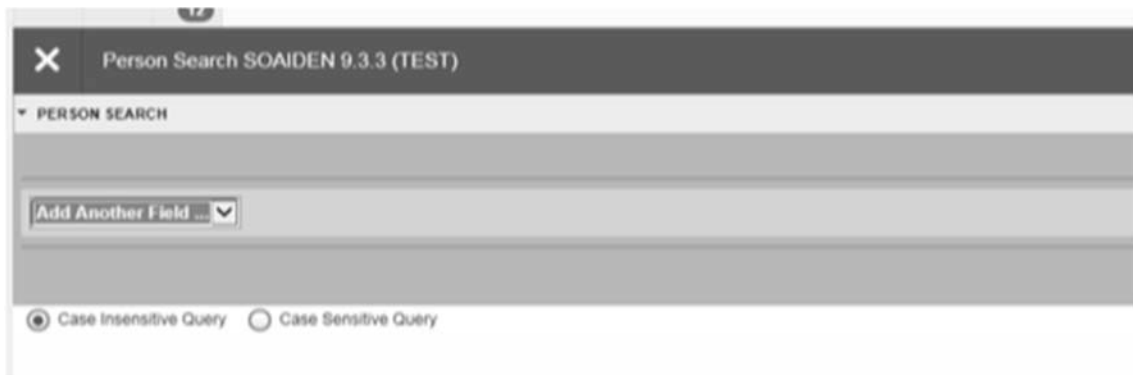
3. Choose an operator from the Contains drop down list. The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other).
The **Contains** operator is available for alphanumeric and other fields only.
The **Between** operator includes the values entered. For example, 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.

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.

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 L0055%47%.

1. Select the lookup icon (…).

2. Choose the type of search to be completed from the option list.
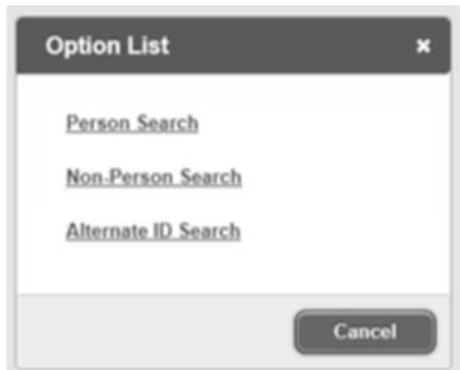
3. Begin the filter process by selecting the appropriate filter. (i.e. ID, Last Name, etc.)
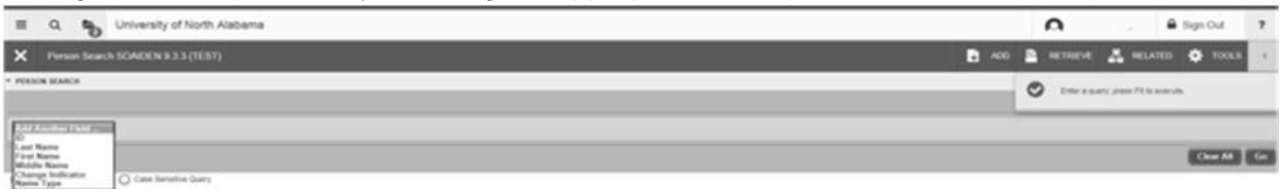
4. Choose the appropriate operator for the list.
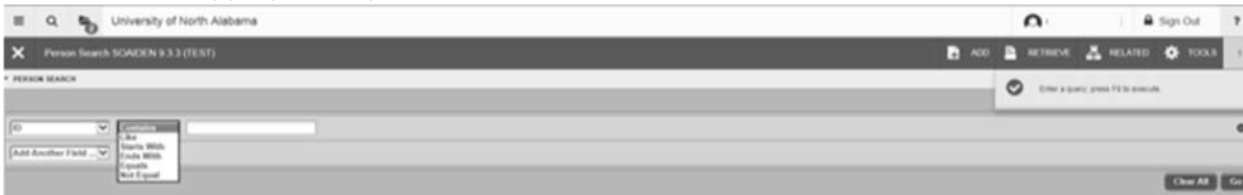
5. Add any additional filters if any additional information is known. Select Go button.

6. You will be provide 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.

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, and 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 in 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 the 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.

Page through options in grid format

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 Item Properties for a field, place the cursor in the field and select **Tools > Item Properties**. Page through options in grid format

Appendix

Buttons

Banner admin pages include several buttons.

Button	Description
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.

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
Action	Banner 9 Keystroke	Banner 8 Keystroke
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

| Application Navigator	Banner 9 Keystroke	Banner 8 Keystroke
App Nav - Access Help	Ctrl + M	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.
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 the top of the screen to allow you to choose from Oracle Forms, Job Submissions, Menus, Menu Messages, and Workflows to access all forms needed to customize your My Banner.
   - Object 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.
   - Object Selection: Will display the contents of your personal menu.
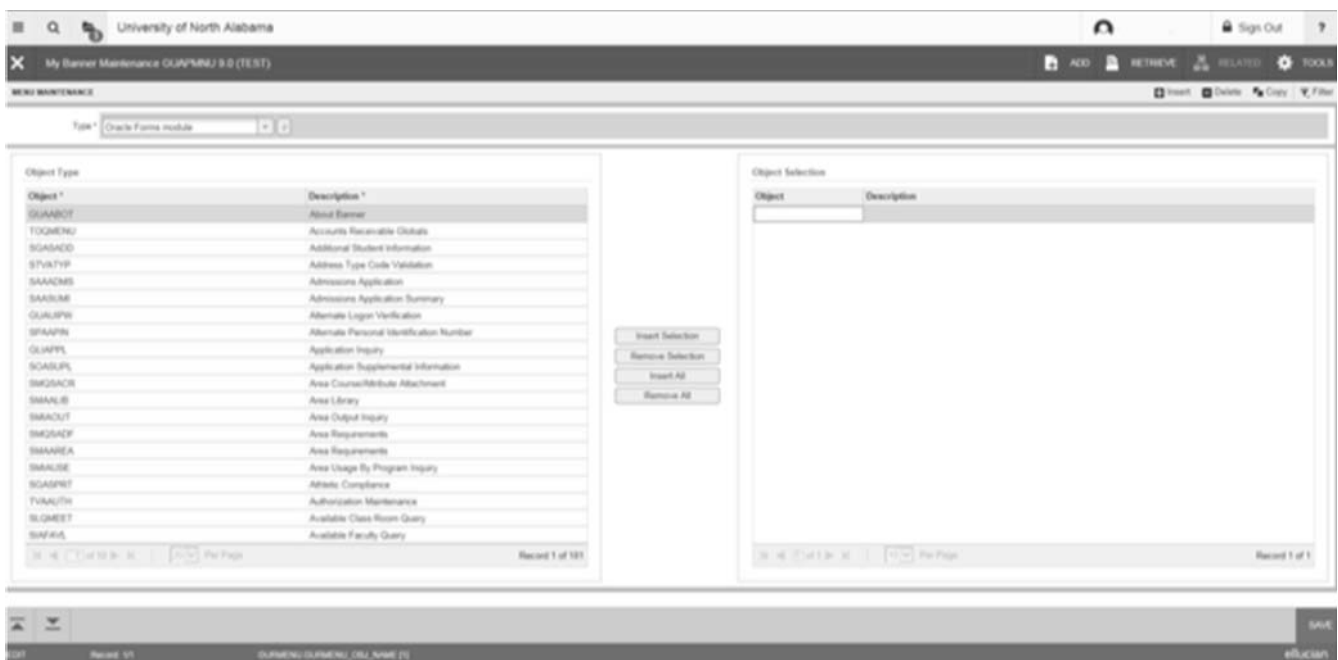
3. To add objects to your personal menu, select the name from the left pane by double clicking it and then use the Insert buttons in the middle of screen to add to the right pane.

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

NOTE: This is a living document and may be updated at any time.