Intro to Banner 9

ADMINISTRATIVE PAGES – NAVIGATION GUIDE
Training Topics

▪ General Overview
▪ Logging into Banner 9
▪ Landing Page
▪ Navigation
▪ Searching and Filters
▪ Updating

▪ Where to find Banner8 Options
▪ Running jobs
▪ Supplemental Data Engine
▪ Banner Document Management (BDM)
General Overview

- Banner 8 and Banner 9 are looking at the same data – only the presentation is changing.

- Banner 8 uses Oracle Forms, which Ellucian is de-supporting in January, 2019; Banner 9 Admin Pages are web based

- Banner Self Service doesn’t use Oracle Forms and will remain the same for now.
General Overview

- In Banner 9 - ‘forms’ are called ‘pages’

- To help navigate in Banner 9, we use an overlay called Application Navigator (AppNav)

- Banner 9 uses Active Directories and Single Sign On to log in – the look is different. It uses the fsa username and password (TEST accounts may have a TEST fsa password that is different from the PROD fsa password – currently using fsa email).
Logging into Banner 9

Recommended browsers
▪ Chrome
▪ Firefox

When Banner 9 PROD is available, the link on the www.mtsu.edu/Banner page will be changed to reflect the new Admin Pages.
Dashboard – Landing Page

... is the initial page loaded in Banner 9. The box highlighted below is repeated on each of the Banner 9 pages.

Expanded view of the dashboard tool bar by selecting --->

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Recently Opened Pages

- Dashboard
- Applications
- Search
- Help
- Sign Out

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Dashboard – Key Word Search
Navigation

- Many navigation short cuts in Banner 8 also exist in Banner 9

- ‘X’ to close out of page – best practice is to close out of current page before going to next page

- Go/Start Over button
Navigation

- **Help** (page help and hover over icons for additional help)
- **Save** (at the bottom of page)
- **Next/Previous Section**
- **Activity Date/User**
Navigation

- **Ordering** (some columns of data can be sorted by clicking on the sort arrow in the column header)

- **Records Per Page** option (must be reset on each page)
Navigation

- **Arranging columns** – click on a column heading to *move column* to another position – or to *resize* a column, click between the two columns and move column width.

- Use `ctrl +` to increase and `ctrl –` to decrease page size.
Navigation – Collapse/Expand Sections
Navigation

- **Scroll bars** to view additional data

- **Notifications** – in upper right corner. To clear notifications, click on the yellow box with a number. This box toggles the messages.
Some data on Banner 8 forms are located in unexpected places in Banner 9.
- **Multiple/Single View** - on some pages. This icon will toggle the display between a line view or detail view.
Searching and Filters

Tab in a blank ID box to search by last name, first name.

If multiple records are returned, the ‘ID and Name Extended Search’ box will popup (similar to Banner 8 search).

Banner 9 pages include a hint to search by name.
Click the ... next to the empty ID box to search for a name using filters (The + is to go to common matching)
You can also filter within a section on a page to narrow down the information returned.
Updating existing data – if the page permits updating a field, make changes and save or use F10 function key to save. A notification will display (success or not).

Insert – select the insert icon on pages that allow insert and a new blank page will appear for data input. Select Save (or F10 function key) when you are complete.
Updating

**Delete** – to remove the record. Remember to select Save to make the change permanent.

**Copy** will create a new record with exact data from the record copied from if the page allows copies. Save to commit changes.
Where to find Banner 8 Options

The Banner 8 Options menu displayed related Banner Forms and processes for the current form, in Banner 9, the related pages are under the selection, and the related processes are found under Banner 9 Tools (not a related Admin Page – scroll to find Options).
Job Submission

- Same as in Banner 8
- All the saved parameters are in Banner 9
- Must be in Submission block to save/run the job
- Save button is at the bottom right, or F10 function key
Job Submission

- **To review output** on GJIREVO look under RELATED (go to a page)

- **To View output in the browser** look under TOOLS (not a page).

- You need to have **popup blocker** set to allow pop-ups for this site.
Supplemental Data Engine – More Information

Not everyone uses Supplemental Data. If forms in Banner 8 had access to SDE, then Banner 9 Admin Pages will have access. Select or Ctrl+Shift+U to access.

If there is SDE data already saved, the icon is shows a full document.
Banner Document Management - Images

To access the BDM Images – select Add or Retrieve
Sign Out

Please remember to close your browser!
Banner 9 Admin Pages – current defects

RZATELS – Page hangs when closing out of page
RZRTNFT – The RZRTNFT_GRANT_TYPE dropdown list is missing a value
SFAREGS -Drop approval required message not preventing registration
SHRTCKN
  • Initiate Repeat/Equivalent Course Checking button is grayed out
  • "Repeat" field is set on "Freeze"
  • Null is missing from the value
SHATERM -Buckets are not displaying correct information in Banner 9, Banner 8 is displaying appropriately
SHATAEQ
  • Unable to enter 'C' or 'D'
  • When clicking on the course and it pulls up SHATATR, it does not keep the transfer institutions course
Banner 9 Admin Pages – current defects

**SHATPRT** – unable to change transcript type from the one that defaults when the page is opened

**SHATRNS** – will not allow delete of an institution

**SOATERM** - Missing check box for "Part of Term"

**SOATEST** – Unable to enter test date manually

**SZAADEF** - Student information in the key block does not persist to this page when coming from another Banner 9 admin page

**SZAREGQ** - Attending hours are not correct

  - A user cannot access SZAREGQ without also having query access to SFAREGQ

  - Change Request: set the default number of records displayed to 10

**TSASPAY** - Multiple transactions being entered requires a refresh after each entry
Other Tips (included on handout)

- Refresh cache on browser (ctrl-shift-delete)
- Disable popup blockers
- Shortcut keys

To be a part of a Banner 9 TEST group, contact your area’s data custodian for more information.
Questions?
Demo Video?