Banner 9 Overview and Navigation

Overview:

This document highlights the differences between Banner 8 (INB) the new Banner 9 (Admin Pages).

The BANNER 8/9 keyboard equivalents are on the last two pages of this document. Many of the keyboard equivalents have not changed, but some have and there are new functions available in Banner 9.

Major changes:

- The ‘Close page’ icon is now on the upper left side of the page (Banner 8 was on the upper right).
- Page messages and errors are displayed in the upper right portion of the page (Banner 8 was at the bottom). Messages are displayed:
  - Informational are displayed in green
  - Warnings (no action required) are displayed in yellow:
  - Fatal/‘Must be corrected’ messages are displayed in red:
• The icon bar and dropdown options from Banner 8 are gone. The same functions are now available in either the ‘Tools’ dropdown (Clear Record, BDMS links, additional sections of the form) or in the icons in section of the page (Insert Record, Delete Record, Clear Record).
• The body of a page will not display until the required fields in the ‘key block’ have valid values and you click the ‘Go’ button (Alt+Page Down).
• Name Search is now accessed using the ellipsis icon at the end of the ID field and this opens a ‘Filter’ type search. NOTE: Use the ‘Equals’ operator to speed the response time for name searches.
• The date and user who performed the last update to data on a section/page is displayed at the bottom of the page.

New Features:

• BANNER 9 has a ‘Hover’ feature. If you place the cursor over an icon, BANNER 9 will display the keyboard equivalent for that icon function.
• Required fields in a page are indicated by an ‘*’ at the end of the field name.

Pages or sections with multiple rows:
• Are sortable (when an ‘*’ is in the column title)
• Include an expanded ‘Filter’ feature
• Have page controls at the bottom of the section to move from page to page and change the default number of records displayed per page
• May have defined ‘frozen’ columns’ (e.g. TSAAREV) because of the about of left/right scrolling available.

General Navigation/Tool bars:

Navigation Bar

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>☰</td>
<td>Toggle menu - Displays the name of each icon below</td>
</tr>
<tr>
<td>🏠</td>
<td>Dashboard - Clicking on this tool will return you to the Navigator home page</td>
</tr>
<tr>
<td>📚</td>
<td>Applications – Click the application menu to access all the banner modules, pages, forms, and quick flows</td>
</tr>
<tr>
<td>🔍</td>
<td>Search – Click this icon to open the search window. You can then enter with the descriptive name of the page or the Banner acronym for the page.</td>
</tr>
<tr>
<td>📊</td>
<td>Recently Opened – lists all pages and forms that have been recently opened</td>
</tr>
<tr>
<td>🛡️</td>
<td>Help</td>
</tr>
<tr>
<td>🚫</td>
<td>Sign Out</td>
</tr>
<tr>
<td>📞</td>
<td>User</td>
</tr>
</tbody>
</table>

Office of the Registrar  East Carolina University  revised 7/8/2018
The Search Box

In this box, you enter either the description of the page or the Banner acronym for the page. Find the desired page in the list and select by clicking or the ‘Enter’ key when using acronym.

The Top Bar

Click here to exit the page.

The title, name of the page and the Banner instance

For BDMS: Puts you in ‘Add a document’ mode in BDMS/Xtender (must log in to WebXtender).

For BDMS: puts you in ‘Retrieval’ mode in BDMS/Xtender (must log in to WebXtender)

Displays additional sections/tabs of the current page and any other pages which may contain related data (replaces the ‘Options dropdown menu in Banner 8).

Make available ‘Actions’, ‘Options’ and access to BDMS/Xtender

The Bottom Bar

a. Move to the next section on the page.
b. Move to the previous section on the page.
c. The last date and user that updated this record.
d. Save the current changes (F10)
e. The mode (Edit/Query)
f. The number of records for this item
g. The full Oracle table/column name and sequence number of the item.
Application Menu

Clicking on Application Menu items with ‘(*…’ and a ‘>’ will open submenus and eventually Page list

Initial Options:          Menus:          Sub Menus:          Page Lists:

You can navigate to a prior menu by clicking on the top option that starts with a ‘<’. For example, clicking on '< Course Catalog (*c…' takes you back to '< Student (*Student), clicking on '< Student (*Student)' takes you back to '< Banner'.

Keyboard shortcuts for Navigation Landing page

Detail Page Layout:

Just like with INB, there is still the ‘Key Block’ on most pages. The key block fields are specific to each page. You will need to complete the required key block fields and then click the ‘Go’ button (or use Shift + F3) to continue.
If you forget the required fields, when you press the ‘Go’ button, the system will display a warning message and the required fields in the upper right.

If you are not sure of the values required in the fields you can use the ‘Look up’ function using the ellipses button → to the right of the entry space. This opens the ‘Lookup’ icon on other field in the body of the page. In this case a dialog box will open with the values and a ‘Search’ box:

In the Search box enter the characters that you want to search on and press the ‘ENTER’ key. The system search both the code and the description for records that contain the entered values. For example, if you enter ‘co’ in the department search, the results returned would be:

When all required fields have been entered and the ‘Go’ button is clicked, you will see the details for the page:
On pages with multiple sections, sections may be collapsed or expanded using the icon next to the block name:

![Diagram of course detail section](image1)

Clicking on the in the ‘Course Detail’ header, collapses that section:

![Diagram of course detail section](image2)

You can use the Scroll bar at the right side of the page to scroll up or down or use the Next/Previous sections tools at the bottom of the page.
You can return to the Key block using the ‘Start Over’ button (or Shift + F2) and the ‘Save’ button is always in the lower right corner of the page.

**Tools within Blocks:**

When you are viewing a section of a page with multiple records you have new options. You can:

- Adjust the width of columns, in the column header bar, point near the column divider bar until the pointer changes to || then hold the mouse button (left button on PCs) and drag the column divider to the size you want.
- Change the order of the columns, click and hold the mouse button (left button on PCs) on the column title and drag it to where you want it to be positioned in the header.
- Sort the records (when the column title has an ‘*’ at the end of the title, click once to sort in descending order and click again to sort in ascending order. Note you may only sort on one column in a grid.
- Use the ‘Filter’ option to find specific sets of records

Note: Changes you make in the grid display are NOT saved, if you close the page and then re-access the page, the system resets to the defaults

Once you have the new Effective Term Record, the Block tools become active:

![Grading Mode Table](image)

**The tools options are:**

- **Insert** Inserts a new blank record for input (either button at the top or bottom of the section).
- **Delete** Deletes the current record.
- **Copy** Copies the current line and inserts a new line under the current position for edit.
- **Filter** Opens the ‘Advanced Search’ tool. This option is only available if there are more records in the section that can be displayed at one time and on query pages like SSASECQ.
Filtering Data

When the Filter option is available, you can create simple or complex queries to return existing rows. The fields available for use in the filter query will vary depending on the page/section you are using. There are three columns for filter definitions:

- Field to use in the filter (all the fields in the grid are available in the dropdown)
- Operator to use on the field
- Value(s) to match against the field

To start the filter search, select a field from the ‘Add Another Field’ dropdown:

Then select the ‘Operator’ and enter a value for the operation to act upon, then either add additional fields to the filter or click the ‘Go’ button to execute the query.

‘Contains’ is the default operator for alphanumeric fields, however you may also select other options depending on the type of data contained in the field you select to use in the query:

<table>
<thead>
<tr>
<th>Numeric</th>
<th>Alphanumeric</th>
<th>Dates</th>
<th>Other</th>
<th>Checkbox</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equals</td>
<td>Contains</td>
<td>Equals</td>
<td>Equals</td>
<td>Equals Checked</td>
</tr>
<tr>
<td>Not Equals</td>
<td>Starts With</td>
<td>Between</td>
<td>Not Equals</td>
<td>Equals Unchecked</td>
</tr>
<tr>
<td>Not Equals or is null</td>
<td>Ends With</td>
<td>Greater Than</td>
<td>Contains</td>
<td></td>
</tr>
<tr>
<td>Between</td>
<td>Equals</td>
<td>Greater Than or Equal to</td>
<td>Starts With</td>
<td></td>
</tr>
<tr>
<td>Greater Than</td>
<td>Not Equals</td>
<td>Less Than</td>
<td>Ends With</td>
<td></td>
</tr>
<tr>
<td>Greater than or Equal to</td>
<td>Not Equals or is Null</td>
<td>Less Than or is Null</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less Than</td>
<td>Less than or Equal to</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less Than or is Null</td>
<td>Less than or Equal to or is Null</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------</td>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than or Equal to</td>
<td>Is Null</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than or Equal to or is Null</td>
<td>Is Not Null</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Null</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Not Null</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: While the ‘Contains’ operator is the default, when searching on pages with large numbers of records, (SOAIDEN, TSAAREV, etc.) using the ‘Equals’ operator will be much quicker. When the ‘Between’ operator is used the check is inclusive of the low and high values. For example, if you enter a Between range of 1 and 5, the values of 1, 2, 3, 4 and 5 are considered.

Create the query rule, click the ‘Go’ button and the results will be returned in the page.