Banner 9 Transition - Quick Reference
Introducing *Application Navigator*

WESTERN MICHIGAN UNIVERSITY

Banner 9 is a major upgrade to the Banner Student System, providing a completely new look and feel. It is easily compatible with all mobile devices. It introduces the **Application Navigator**, a single web page to access both forms and self-service menus within a web browser.
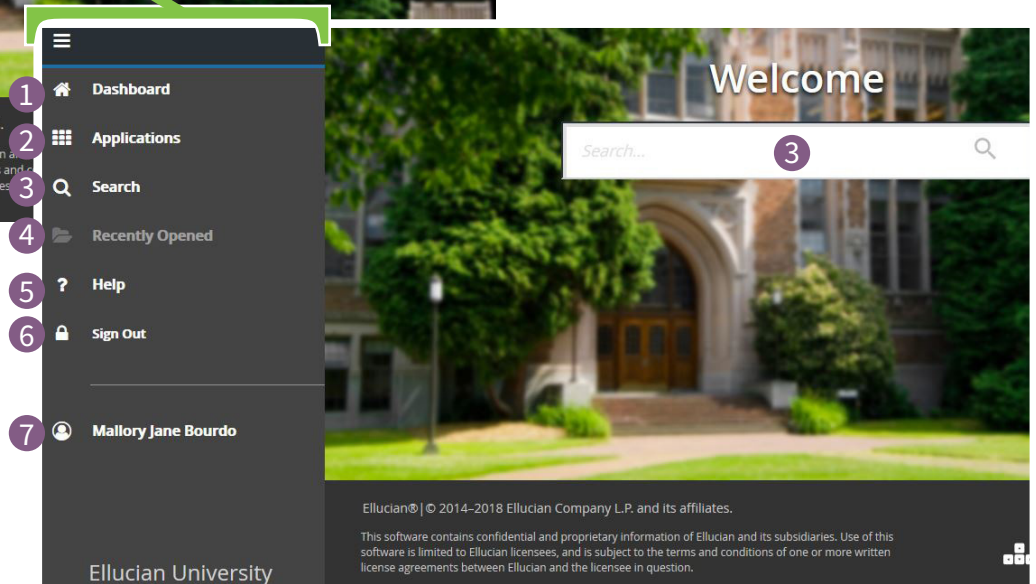
Banner 9 Features

- 'Forms' will be referred to as 'pages'
- Form names will be the same
- Mobile, tablet, and web-browser friendly
- Expand and collapse sections in a page
- Improved filtering options
- Sort and reorder columns
- Ability to find pages by description
- Application Navigator expands to the size of the browser window, and can be enlarged to the size of the computer screen

Landing/Welcome Page

Expand and collapse the navigational sidebar throughout your Banner session by clicking the button in the upper left corner.

1 Dashboard
takes you to the Welcome screen

2 Applications
search through the tree of all Student, Financial Aid, and General pages

3 Search
search for pages (forms) by page name (e.g. SPAIDEN) or by any word in a page description (e.g. Student Course Registration)

4 Recently Opened
view a list of all recently opened pages, and quickly access and re-open from the list

5 Help
based on the Banner page you have open at the time, this link opens an ellucian webpage providing information and help specific to the Banner page

6 Sign Out
log out of the application

7 Banner User
the name of the person logged into the Banner session

TIP:
At the beginning of the transition to the upgrade, Banner 8 (former) and Banner 9 (new) will both be accessible at the same time.

Run Banner 8 and Banner 9 side-by-side to familiarize yourself with the changes until you feel comfortable with the new *Application Navigator*.
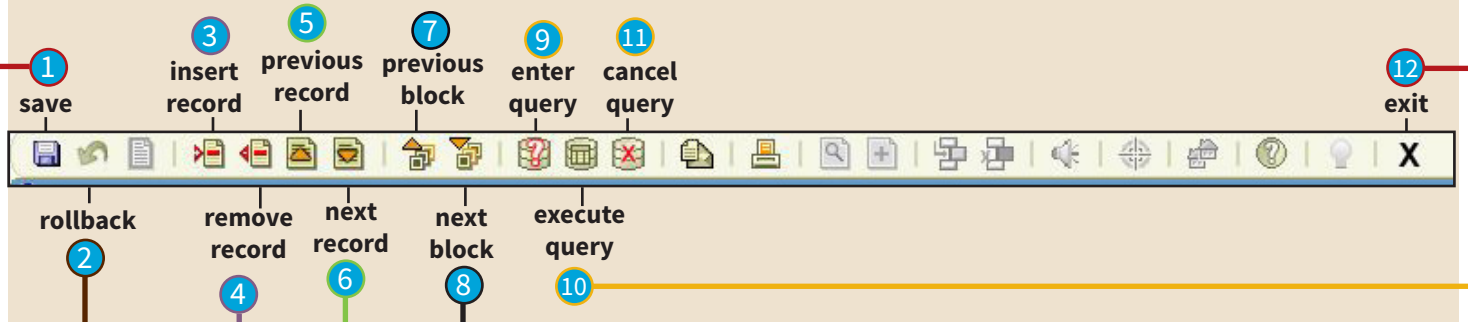
Finding Toolbar Functions

Banner 8 Toolbar:

1 save
2 rollback
3 insert record
4 remove record
5 previous record
6 next record
7 previous block
8 next block
9 enter query
10 execute query
11 cancel query
12 exit

[Banner 9]

Basic Navigation

Page Header

- **Page close X icon** - always use this icon to close the 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 button** - refresh, clear record, and other options controlled by this page
- **Notification Center** (appears to the right of Tools when applicable) - displays notifications for successful save of data, warning messages, error messages, and informational messages

Key Block

The first block for (most) pages that determines what data is entered or displayed on the rest of the page.
- Select the **Go** (formerly *Next Block*) button to leave the key block and access the body of the page.
- Return to the Key Block from within the body of the page by clicking the **Start Over** (formerly *Rollback*) button.

Basic Navigation

Sections

- **Sections** (formerly *Blocks*) are accessed by scrolling up and down the page.
- Sections can be collapsed or opened by clicking on the small arrow on the left side of the section header.
- Section headers include icons for the following actions:
  - **Insert** - insert records in the section
  - **Delete** - delete records in the section
  - **Copy** - copy records in the section
  - **Filter** - filter records in the section

Tabs

Scroll through multiple records by using the horizontal arrows.

Bottom Section Navigation

- **Previous Section button** - takes you backward in the sections (Alt + Page Up)
- **Next Section button** - takes you forward in the sections (Alt + Page Down)
- **Activity Date** - time stamp for the most recent creation or modification to the record
- **Activity User** - BroncoID of the user who made the most recent creation or modification to the record
- **Save button** - saves changes to the record
- **Record** - shows the total number of records in that section, and your position within the records

Banner 9 Transition - Quick Reference
Introducing *Application Navigator*

Menu Options

Information, pages (forms), and functions previously located in the Options drop-down menu in Banner 8 can now be found in the Banner 9 **Related** and **Tools** drop-down menus. Funtions previously located in the Records drop-down menu in Banner 8 can now be found along the **upper right header of the form**.

[Banner 8]

[Banner 9]

[Banner 8]

System Messages

The Notification Center is located to the right of the Tools menu, and only displays **if** there is an active notification. The following types of information are displayed:

Error Messages are red.
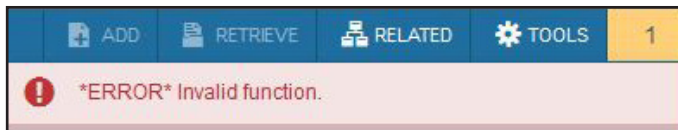
Warning Messages are yellow.

Successful Save of Data Messages are green.

Informational Messages are blue.
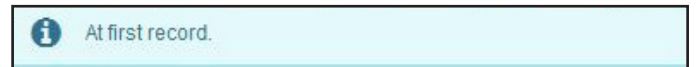
To dismiss the notification message, click on the yellow notification box. ➡

Search/Query

If you need to search or query for the information for a 'field' (e.g. a WIN, a student's name, a course section), select the **button with three dots** to the right of the field.

1

2

→ Close unneeded search fields *(optional)*

→ **Type desired search information into appropriate fields**

Once desired search parameters are complete, click Go button, or hit F8 on keyboard.

→ Option to choose Case **Sensitive** or **Insensitive** Query *(insensitive query is default)*

Search/Query

3

Person Search SOAIDEN 9.3.5 (B0004) ADD RETRIEVE RELATED TOOLS

▼ PERSON SEARCH Insert Delete Copy Filter

Active filters: See the active filters used here. Click **Filter Again** to change or add search filters. Filter Again
Last Name : test ⊖ Click the **minus** button to remove an active filter.
First Name : carrie ⊖ Clear All Click on any of the column headings to sort the the column alphabetically.

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Su
834155525	Test	Carrie	D		Name Change		
834155525	Test	Carrie	Donetello		Name Change		
834155525	Test	Carrie			Name Change		
834155525	Test	Carrie	MyName				
834155525	Test	Carrie	do not refund		Name Change		
834155525	Test	Carrie			Name Change		
D840687	Test	Carrie			ID Change		
TESTC	Test	Carrie			ID Change		

Click on the desired row

◄ 1 of 1 ► ► 10 ▼ Per Page Record 1 of 8

⦿ Case Insensitive Query ○ Case Sensitive Query

Once desired record is selected from the search results, click Select.

CANCEL SELECT

QUERY Record: 1/8 SPRIDEN.SPRIDEN_ID [1] ellucian

4

General Student SGASTDN 9.3.9 (B0004) ADD RETRIEVE RELATED TOOLS

Toggle Menu ID: 834155525 ... Test, Carrie M. Student Summary Go

Term: ... View Current/Active: ☐
Curricula

Enter any additional required fields if necessary (e.g. Term) and click Go.

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

8

Banner 9 Transition - Quick Reference
Introducing *Application Navigator*

Common Keyboard Shortcuts

Function	Banner 8 Shortcut (old)	Banner 9 Shortcut (new)
Next Section (*formerly Next Block*)	Ctrl + Page Down	Alt + Page Down
Previous Section (*formerly Previous Block*)	Ctrl + Page Up	Alt + Page Up
Next Field/Item	Tab	Tab
Duplicate Item	F3	F3
Duplicate Selected Record	F4	F4
Clear One Record	Shift + F4	Shift + F4
Rollback / Start Over	Shift + F7	F5
Clear All in Section		Shift + F5
Insert / Create Record	F6	F6
Delete Record	Shift + F6	Shift + F6
Enter Query	F7	F7
Execute Query	F8	F8
List of Values	F9	F9
Save	F10	F10
Print	Shift + F8	Ctrl + P
First Page		Ctrl + Home
Last Page		Ctrl + End
Today's Date Autofill	any letter key, Enter	any letter key, Enter