



Banner 9 Navigation Quick Start Guide

North Orange County Community College District
Information Services

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Introduction

Welcome to Banner 9! This guide will introduce you to a brand new experience using current web technology. While the appearances of menus and forms will have an updated look, the processes you use on a daily basis will remain largely unchanged.

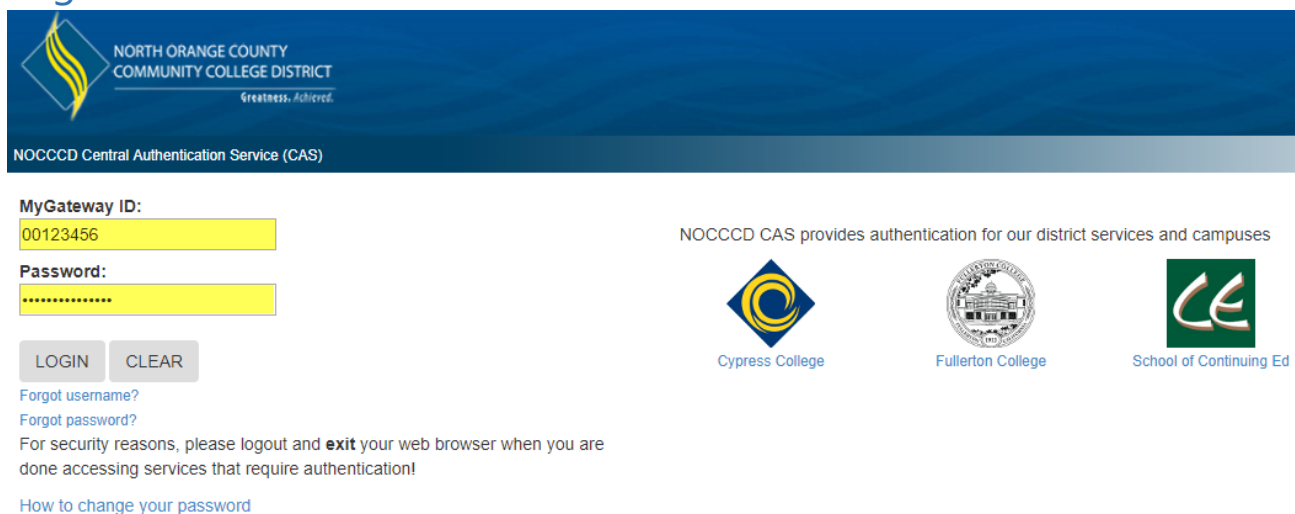
In this guide, the following topics are covered:

- Log in/out of Banner 9
- Banner 9 Dashboard
- Navigation Menu
- Banner 9 Pages
- Filters
- Customized Menu

Learn new terms and those that changed from Banner 8. For example, *Forms* in Banner 8 are called *Pages* in Banner 9.

Please note that this Banner 9 Navigation Guide is a living document and subject to modification at any time.

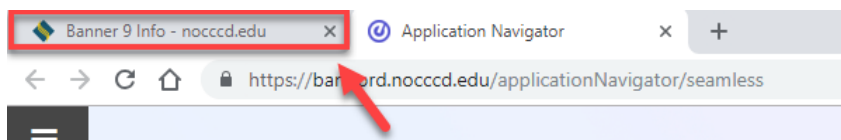
Login Procedure



The screenshot shows the Banner 9 login page. At the top is the North Orange County Community College District logo with the tagline 'Greatness. Achieved.' Below this is the 'NOCCCD Central Authentication Service (CAS)' header. The main login area has two yellow input fields: 'MyGateway ID:' containing '00123456' and 'Password:' with masked characters. Below these are 'LOGIN' and 'CLEAR' buttons. To the right, text states 'NOCCCD CAS provides authentication for our district services and campuses' above logos for Cypress College, Fullerton College, and the School of Continuing Education. At the bottom left are links for 'Forgot username?', 'Forgot password?', and 'How to change your password', along with a security notice: 'For security reasons, please logout and exit your web browser when you are done accessing services that require authentication!'.

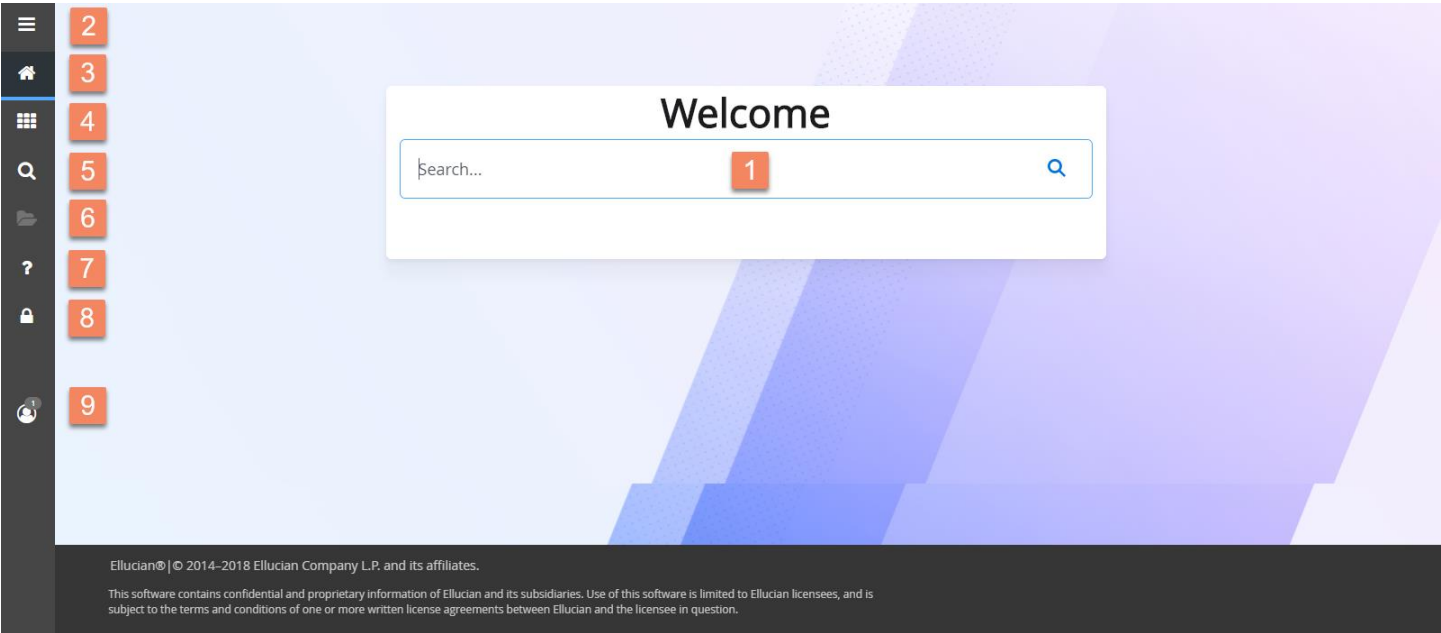
1. Open your browser (recommend Chrome or Firefox) and go to the myGateway login page
2. Enter your 8-digit Banner ID number (ex: 00123456) in the *MyGateway ID* field
3. Enter your password in the *Password* field and click the *Login* button to continue
4. When the myGateway home page appears, click on the *Banner 9 Info* link in the navigation menu
5. Under the *Banner 9 TEST* column, click on the *TEST Banner 9 Admin Pages* link to enter Banner 9

IMPORTANT: The last step before using Banner 9 is to close the myGateway tab in your browser (look for NOCCCD logo and web address in the title). Failure to do so may result in an unexpected logout from your current Banner session. Any unsaved work in progress is lost when you are logged out in this manner.



Banner 9 Dashboard (Home Page)

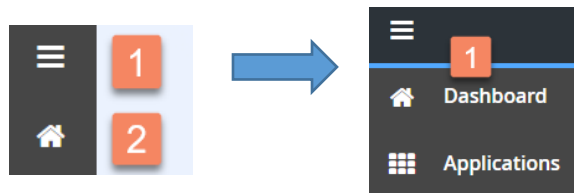
Upon successful login, the Banner 9 Dashboard will display and will look similar to the below example. The Dashboard mainly consists of a search field and a global navigation menu available throughout Banner 9. The table that follows the example provides a brief description of each numbered area.



Area	Description
1	Main search bar. Displays suggestions as you type in search terms.
2	Toggle main menu descriptions
3	Return to Banner 9 Dashboard
4	Displays Applications and My Links menu
5	Global search bar. Available on all screens
6	Displays recently opened pages for quick access (when available)
7	Help page (when available) and navigation menu keyboard shortcuts
8	Sign out of Banner 9
9	Current user, Banner messages, and preference settings

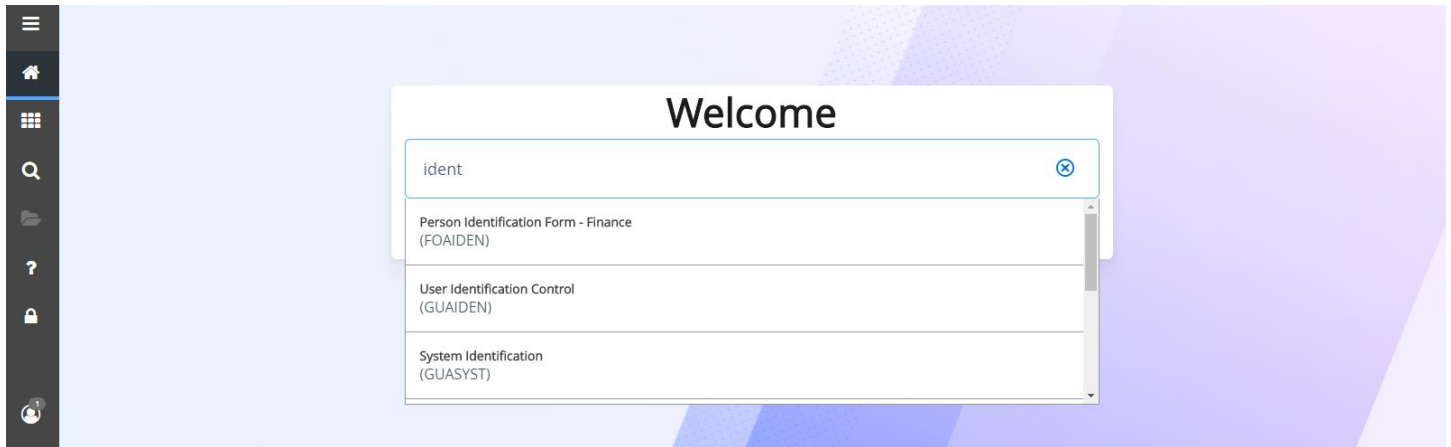
Toggle Menu and Home

Click the Toggle Menu button 1 to hide or display icon descriptions in the global navigation menu. Click the Home button 2 to display the Dashboard Welcome page again.



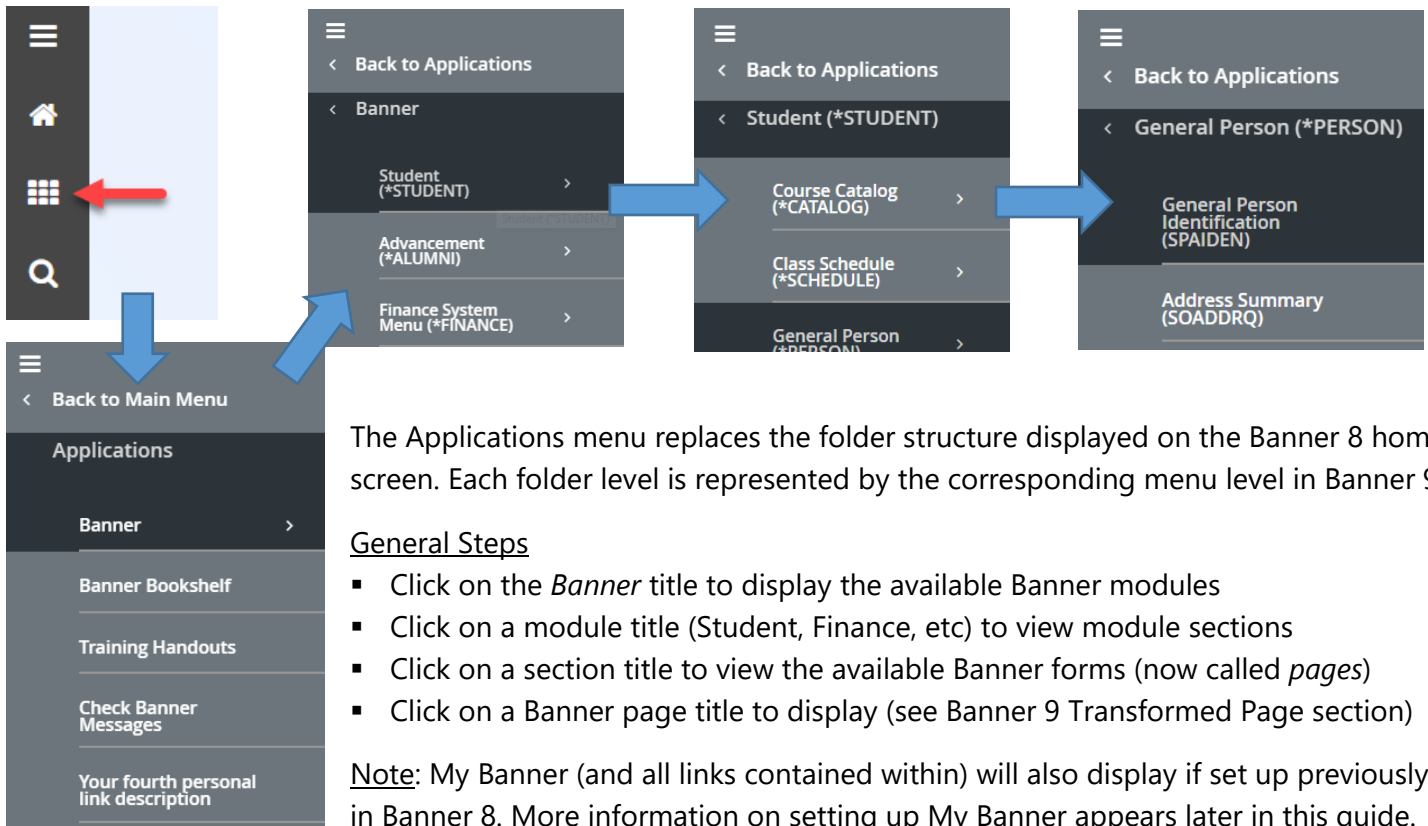
Search Field

For quick access to any Banner page, begin typing the name or description in the search field featured prominently in the center of the Dashboard. As you start typing, Banner will display suggested page names. Continue typing until the exact name of the page appears in the list, point and click to open that object.



Applications Menu

Clicking the Applications button in the navigation bar (or Ctrl-M on your keyboard) will display the Banner 9 main menu at the top level. See the below menu navigation example.



The Applications menu replaces the folder structure displayed on the Banner 8 home screen. Each folder level is represented by the corresponding menu level in Banner 9.

General Steps

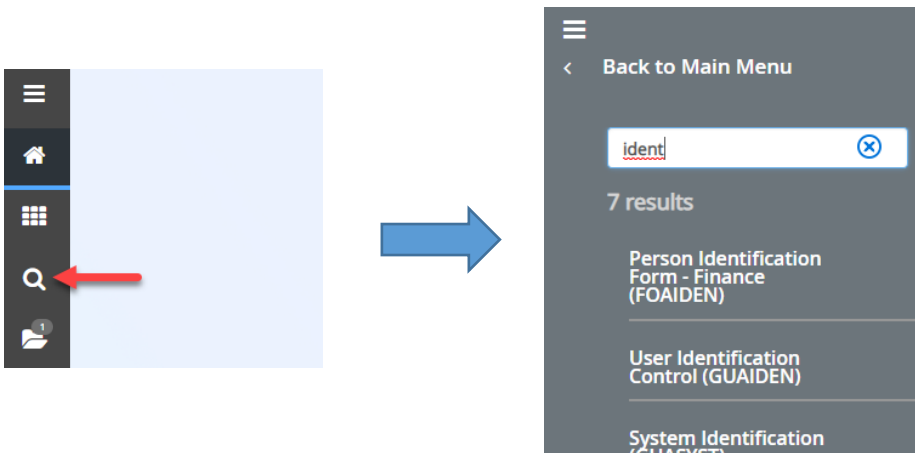
- Click on the *Banner* title to display the available Banner modules
- Click on a module title (Student, Finance, etc) to view module sections
- Click on a section title to view the available Banner forms (now called *pages*)
- Click on a Banner page title to display (see Banner 9 Transformed Page section)

Note: My Banner (and all links contained within) will also display if set up previously in Banner 8. More information on setting up My Banner appears later in this guide.

Also included in the *Applications* menu is the *My Links* section appearing underneath the *Banner* and *My Banner* (if available) menus. *My Links* can be customized to link directly to other Banner pages or web addresses. Click on a link with the "personal link" label to get more information, options, and directions.

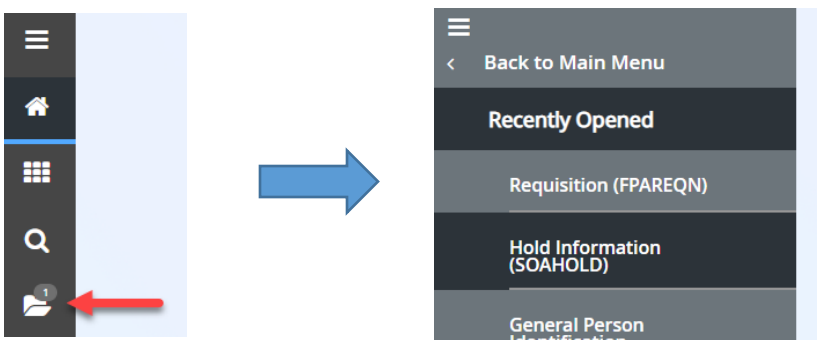
Global Search Bar

A search bar is also available in the global navigation bar. This search bar performs in a similar manner to the main page search field.



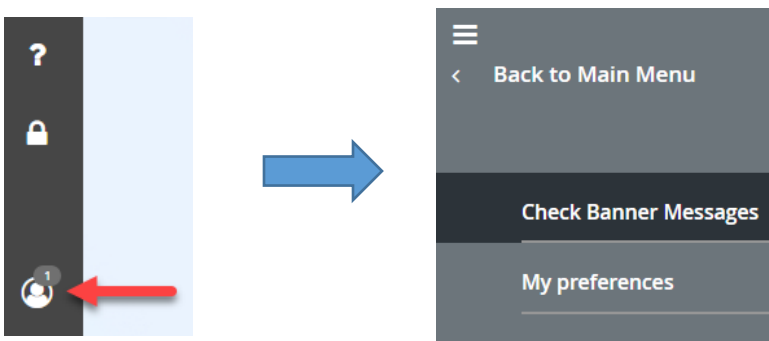
Recently Opened Pages

Click the folder icon in the global navigation menu to display a list of recently opened pages. Point and click on a page in the list to access. This icon appears after the first page is opened during the current session.



User Profile

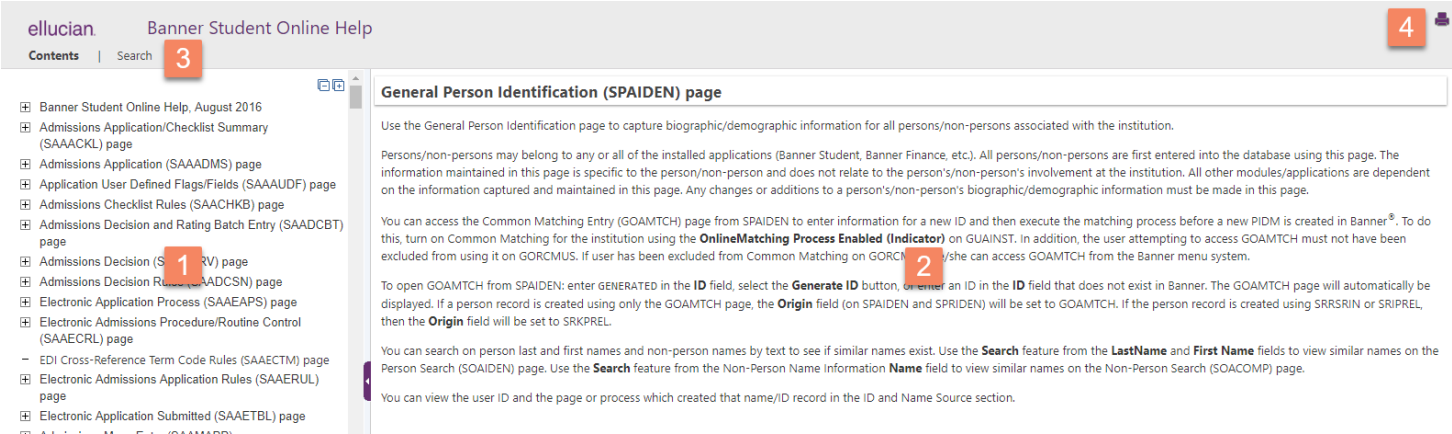
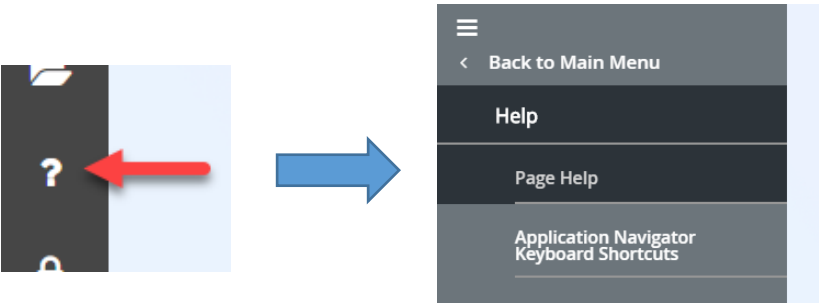
At the bottom of the navigation menu is the User Profile icon. If the menu descriptions are displayed, this icon will also list the currently logged in Banner user. Clicking on the icon will display a menu with two options. A number appearing on the icon indicates that many messages are waiting to be viewed.



Check Banner Messages will display messages directed to the current user (usually Finance related). *My Preferences* allows the current user to customize the appearance of the Banner 9 interface and set up custom links in the Applications menu.

Help Page

Online help is available on most Banner 9 screens by clicking the ? icon in the global navigation menu. The *Banner General Online Help* page will open in a separate web browser tab and displays the available help information for the page/screen that is currently active.



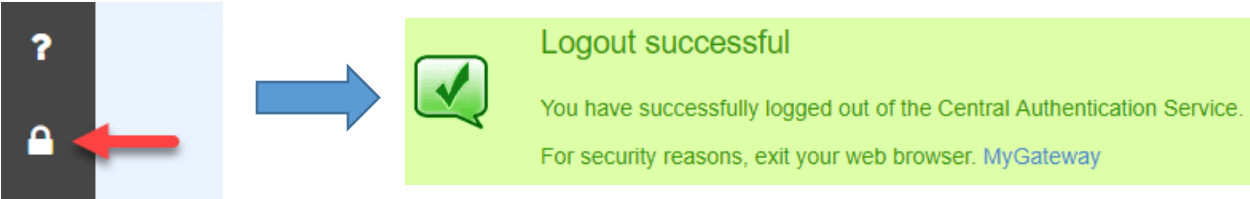
Area	Description
1	Navigation area displaying all available Banner pages with help information
2	Content area displaying help information for the selected Banner page
3	Global search bar. Available on all screens
4	Print help information for the selected Banner page

Keyboard Shortcuts

To view the available keyboard shortcuts, click on the Application Navigator Keyboard Shortcuts link in the Help menu. These shortcuts are available anywhere in Banner 9.

Banner Log Out

Click the *Sign Out* button located near the bottom of the global navigation menu to securely log out of Banner. A message will display once logout is complete. You can close your browser at this point.



Banner 9 Transformed Page

Below is the general appearance of a Banner 9 page.

The screenshot shows the Banner 9 Transformed Page interface. It features a dark sidebar on the left with navigation icons. The main area has a blue header bar with the title 'General Person Identification SPAIDEN 9.3.13 BAN9-32 (PPRD)' and buttons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. Below the header is a search bar with an 'ID:' label and a 'Go' button. A grey instruction bar below the search bar reads: '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.' The main content area is empty. At the bottom, there is a status bar with 'EDIT', 'Record: 1/1', 'KEY_BLOCK.ID [1]', and a copyright notice '©2000 - 2018 Ellucian. All rights reserved.' The ellucian logo is in the bottom right corner. Numbered callouts are placed as follows: 1 on the sidebar, 2 on the header bar, 3 on the search bar, 4 in the main content area, 5 on the section navigation controls, and 6 on the status bar.

Area	Description
1	Global Navigation Bar appearing on all pages.
2	Page Header Area
3	Key Block and Auto Hint Line. Type in the appropriate data in the search field(s) provided.
4	Sections Area. Displays additional data associated with the key block.
5	Section Navigation Controls
6	Additional information on the section or page currently displayed

Key Block Area

When a page is first access, all that appears is the Key Block area. The rest of the data for the current page will display after a successful search.

This area contains the following information:

This screenshot is a cropped version of the one above, focusing on the top portion of the page. It shows the blue header bar with the title and action buttons. Below it is the search bar with the 'ID:' label and the 'Go' button. The grey instruction bar is also visible. The main content area is empty. The status bar at the bottom shows 'EDIT', 'Record: 1/1', and 'KEY_BLOCK.ID [1]'. The ellucian logo is in the bottom right corner.

- X button – Closes the current page
- Page Description, short name, Banner version, and database name
- Auto Hint Line – Brief instructions on entering information in the key block
- Go button –Click button to search and display record. Same as next block.
- Add and Retrieve button - Banner Workflow and Document Management buttons (not used at NOCCCD)
- Related button – Shows other pages (if available) associated with data on the current page
- Tools button – A list of standard actions and other options specific to the current page

Key Block

The first block displayed on most pages will be the Key Block. The contents of the Key Block determines what information is entered by the user or displayed on the rest of the page.

The key block can be something as simple as entering an ID number for a person, vendor, requisition, or transaction. In other instances, key blocks may contain multiple parameter fields that require input before the requested information is located and displayed.

Parameter fields may also include a search (ellipsis) button that displays additional screens to aid in entering the correct information. Also note that parameter fields may be automatically populated based on what is set in other fields previously.

In the below example, let’s start by entering the information in the entry field (containing the asterisk) and pressing the green Go button (or *Enter* key on the keyboard) on the right side to start the lookup process.

ellucian

General Person Identification SPAIDEN 9.3.13 BAN9-32 (PPRD)

ADDRETRIEVERELATEDTOOLS

ID: @00650443

Fullerton, Fred

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.

Click the Go button to confirm and display the associated information on the page. Note the key block is located at the top of the information page.

ellucian

General Person Identification SPAIDEN 9.3.13 BAN9-32 (PPRD)

ADDRETRIEVERELATEDTOOLS

ID: @00650443

Fullerton, Fred

Start Over

Current Identification

Alternate Identification

Address

Telephone

Biographical

E-mail

Emergency Contact

Additional Identification

IDENTIFICATION

InsertDeleteCopyFilter

ID @00650443Name Type

PERSON

InsertDeleteCopyFilter

Last Name FullertonPrefix

First Name FredSuffix

Middle NamePreferred First Name

Full Legal Name

NON-PERSON

InsertDeleteCopyFilter

If the required information is not available, click the ellipses button to the right of the entry field to bring up a filter search or lookup table.

ellucian

Person Search SOAIDEN 9.3.12 (PPRD)

ADDRETRIEVERELATEDTOOLS

PERSON SEARCH

InsertDeleteCopyFilter

Active filters: Last Name : fullertonClear AllFilter Again

ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix	Name Type
@01292149	Fullerton	Anna Kay	Alesia	02/23/1984				
@00532732	Fullerton	Brian	Allan	10/20/1982				
F705160	Fullerton	Brian	Allan	10/20/1982	ID Change			
S396476	Fullerton	Brian	Allan	10/20/1982	ID Change			
@01335114	Fullerton	Carson	Gregory	11/25/2004				
@00245091	Fullerton	Cindi	Darlene	03/30/1970				
@00000000	Fullerton	Darlene	T	03/30/1970				

Note: Refer to the *Filter* section in the user guide if a filter search appears instead of a lookup table.

Sorting options are also available. Click on any of the headers to enable ascending or descending sort on the data column. Once the desired information is found, double click on the corresponding data displayed in the leftmost column to import back into the entry field in the previous form.

The example below requires setting multiple parameters in order for a search (or targeted search) is performed.

Organization Budget Status FGIBDST 9.3.6 (PPRD)

ADDRETRIEVERELATEDTOOLS

Chart: *
Index:

Fiscal Year: * 19
Query Specific: *
Account
Commit Type: Both

Go

Include Revenue: ☒

Accounts

Organization:
Program:
Account Type:
Location:

Fund:
Account:
Activity:

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.

In some cases, setting one parameter may result in others being automatically set as well. Once all necessary parameters are set, click the Go button to search for the record and display.

Related Pages

If available, clicking the *Related* button will display a list of other pages that can be directly accessed.

ADDRETRIEVERELATEDTOOLS

Ac Search

Budget Summary Information [FGIBSUM]
Shift+F2

Organization Encumbrances [FGIOENC]
F4

Transaction Detail Information [FGITRND]
F3

Tools

Click the *Tools* button to display the search bar, export, print, or other available actions and options listed.

ADDRETRIEVERELATEDTOOLS

Ac Search

ACTIONS

Refresh
Export
Print Screenshot
Clear Record
Clear Data

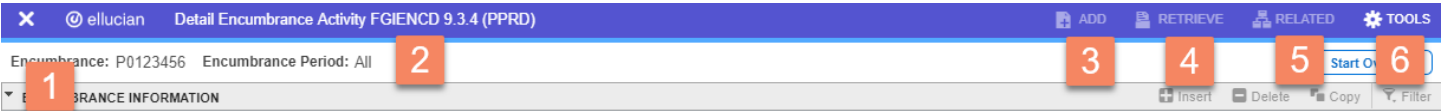
F5
Shift+F1
Ctrl+Alt+P
Shift+F4
Shift+F5

Important Note: Often, an action performed in Banner 8 may not be possible in Banner 9, due to how a web page is programmed. In those cases, the action may be relocated to the Related and Tools menu. Please check there is an action in a Banner page seems “missing” from what you are used to seeing in Banner 8.

Sections

Each Banner page will contain sections (or blocks) of additional data for the key information. Controls are available to access pages containing multiple records and tabs for multiple sections.

Below is an example of an active section header with descriptions. Section headers appear below the key block. Areas 3, 4, and 5 are applicable only in sections that allow data entry. If data entry is allowed on the same page in Banner 8, then it should work in Banner 9 as well.

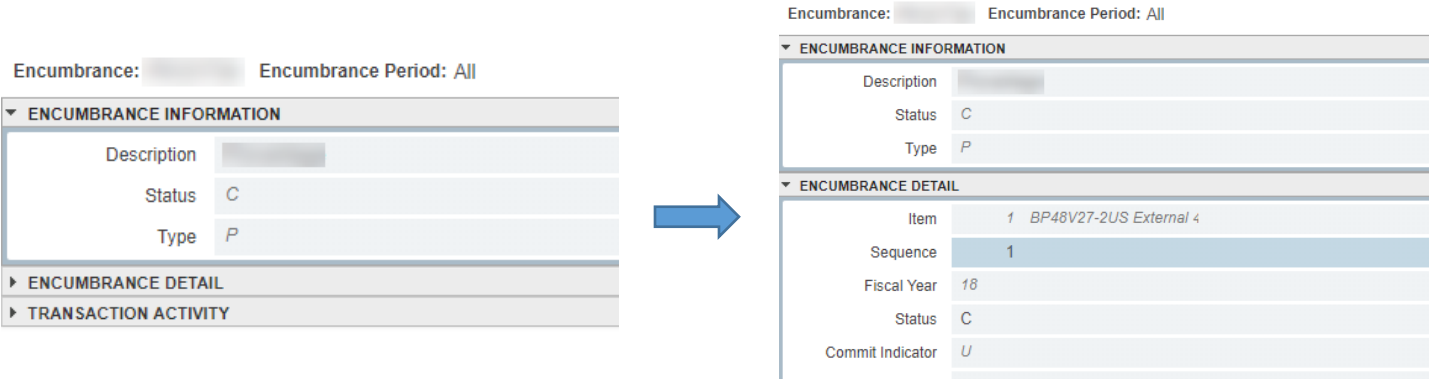


Area	Description
1	Carat icon that expands or collapses a section of information
2	Description of records contained in this section of information
3	Insert a new record below a selected existing record in this section
4	Delete an existing record below a selected existing record in this section
5	Copy a record and insert below the original record in this section
6	Filter records in this section. Save any changes before using this function.

Note: Only one section header can be active at any time, with all other headers grayed out. To make another section header active, simply click on a data field in that section to activate.

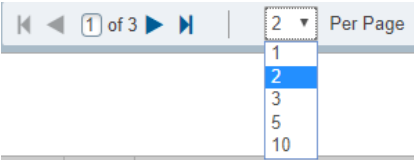
Expand/Collapse Section

Sections can be expanded/collapsed by clicking on the carat symbol located at the bottom left of a section header.



Record Controls

Controls are also available to view each record individually or in multiples by adjust the number of records to display in the section. The control appears at the bottom of the displayed section.



Navigation Controls

Controls are available to navigate sections, perform other functions, and display additional information.

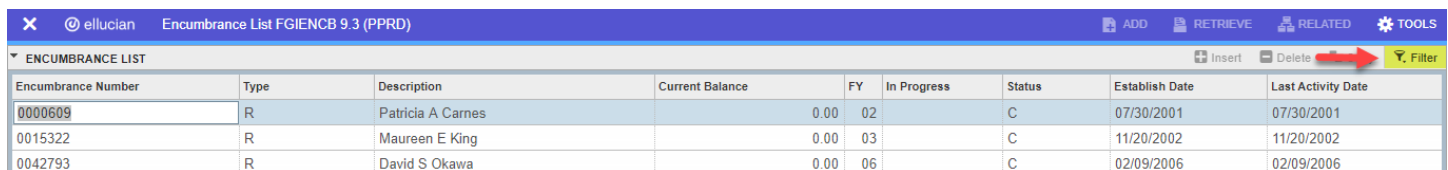


Area	Description
1	View previous (up arrow) and next (down arrow) sections of the page
2	If applicable, details on latest activity and user who created/modified the displayed information
3	Cancel/Select/Save buttons pertaining to a selection list (depicted above) or displayed record
4	Associated record and table information appears at the bottom of this area

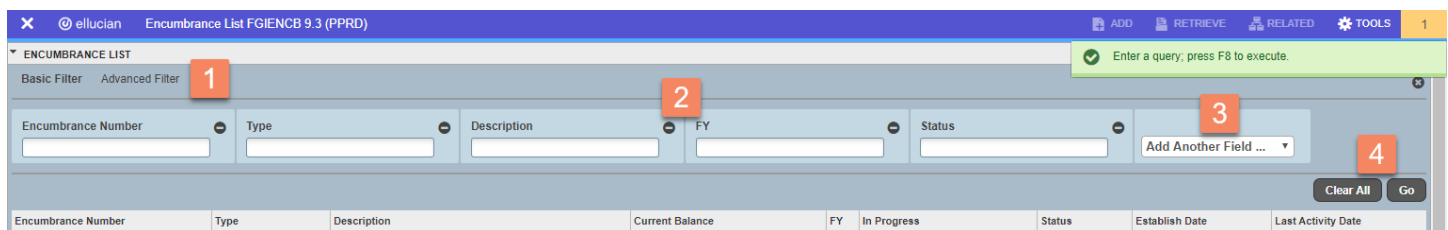
Filters

If available, a filter feature is available to conduct a search or show a subset of displayed data in a page section.

1. Click the *Filter* button on the far right of a page section displaying a set of data.



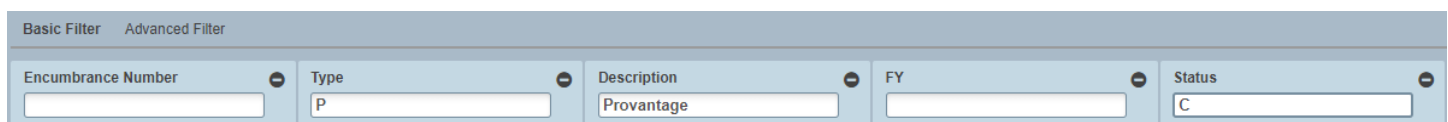
2. The filter feature appears with a set of default fields and other options.



Area	Description
1	Switch between Basic and Advanced Filters. Default is set to Basic Filter.
2	Current data fields active for the filter
3	Add another data field to the filter
4	Buttons to clear all data fields from the filter and to execute the filter on the data entered

Basic Filter

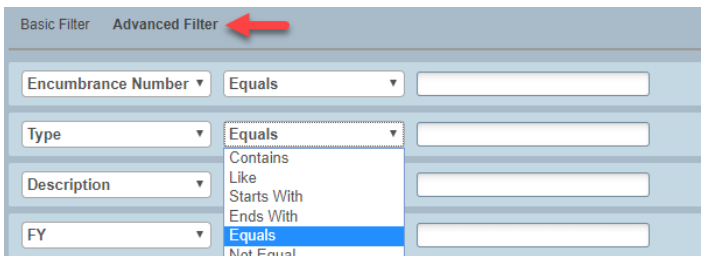
The basic filter will search on the exact information you provide in the active data fields.



In the above example, this search displays records that satisfy all of the search conditions. For searches that have complex conditions, use the Advanced Filter. Note: The wild card (%) is supported in searches.

Advanced Filter

Clicking the *Advanced Filter* option will display the active data fields, along with a selectable logic operator and a field to enter a value to filter. Be sure to enter a value type consistent with the data field for accurate results.



3. To remove a data field from the filter, click the minus icon at the top right of the data field box (Basic) or the far right of the data field row (Advanced)



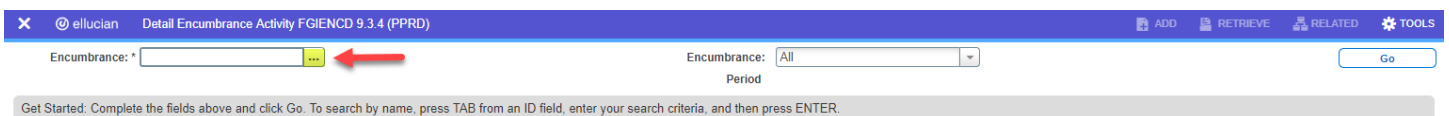
Basic Filter Advanced Filter

4. To add a data field, click the *Add Another Field* drop-down box and select the desired data field.

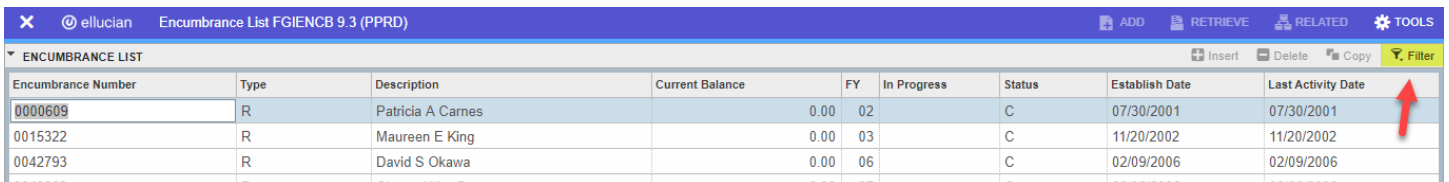


5. Repeat Step 3 and 4 to set up or remove data fields to the filter, as needed.
6. Click the *Go* button at the bottom right of the filter box to activate the filter and view results. To clear all filters and start over, click the *Clear All* button.

To conduct a search from the key block, click on the available ellipses button to the right of a key field.



When the data list displays, click the *Filter* button at the top right and follow the directions above to set up the basic or advanced search filter. In some cases, the filter will automatically display.



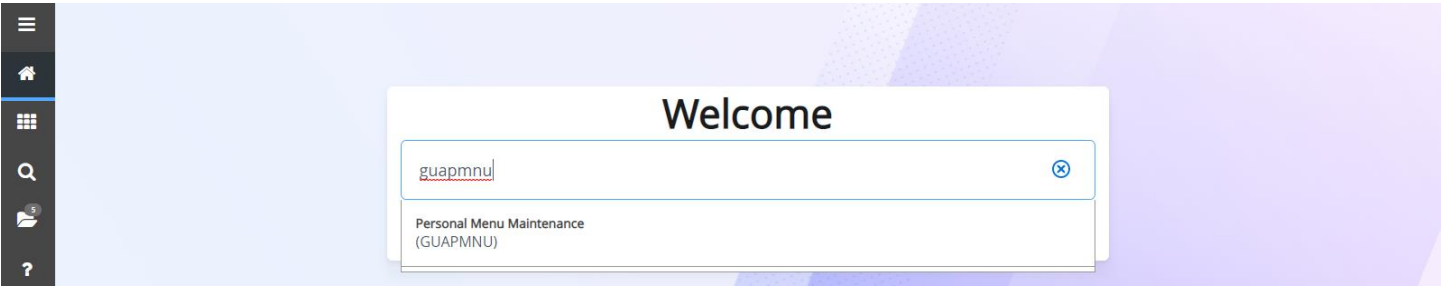
Encumbrance Number	Type	Description	Current Balance	FY	In Progress	Status	Establish Date	Last Activity Date
0000609	R	Patricia A Carnes	0.00	02		C	07/30/2001	07/30/2001
0015322	R	Maureen E King	0.00	03		C	11/20/2002	11/20/2002
0042793	R	David S Okawa	0.00	06		C	02/09/2006	02/09/2006
0040000	R	Christina M. Brown	0.00	07		C	02/09/2006	02/09/2006

My Banner Personal Menu

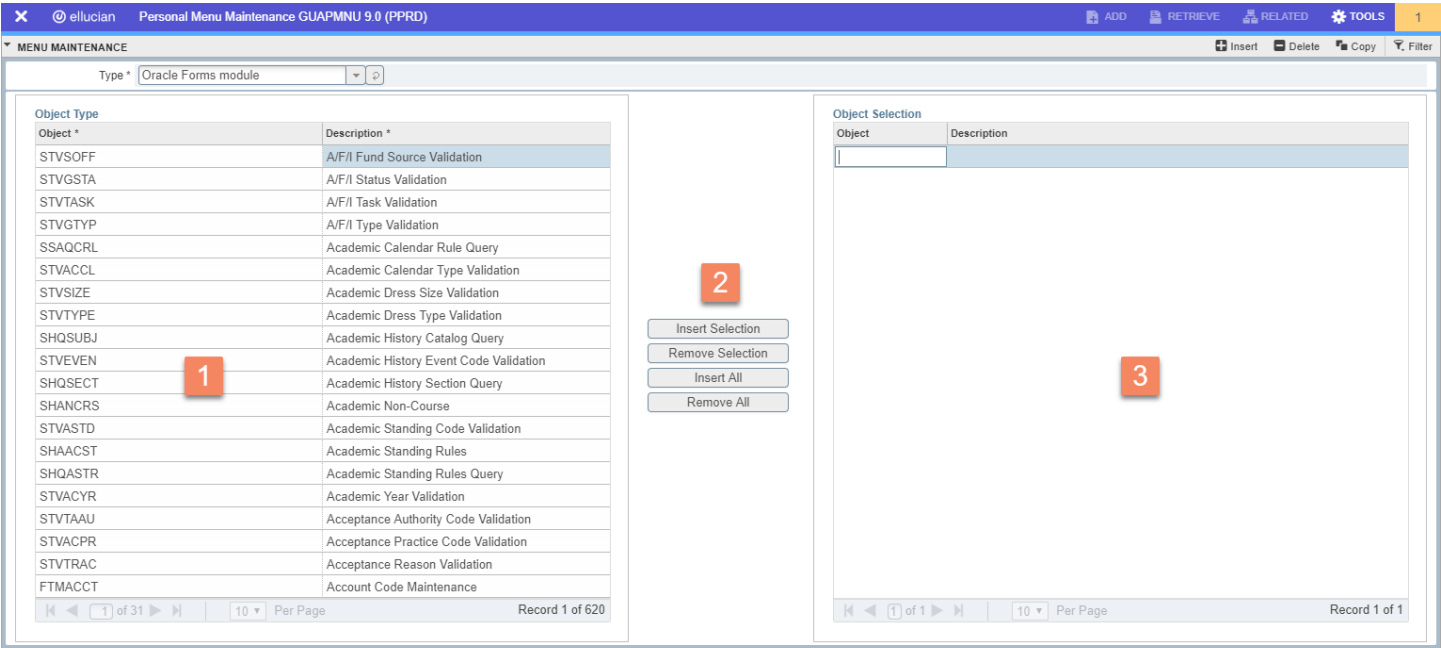
The Global Navigation Menu can be customized by adding a personal menu entry (called My Banner) that contains links to pages, jobs, and menus that are accessed regularly by the user.

To create the personal menu, follow the steps listed below:

- 1. Type GUAPMNU into either the search field on the main Banner page or the search bar that appears next to the main menu button on the top bar. Click on the GUAPMNU entry that appears in the results list.



- 2. The GUAPMNU page appears with a list of available objects that can be added to your personal menu.

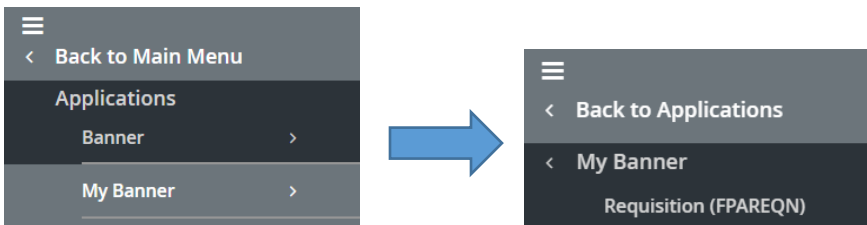


Area	Description
1	Object Type list will display objects that can be added to the personal menu
2	Selection controls to add/remove objects to the personal menu
3	Object Selection list displaying objects that will appear in the personal menu

3. Type in the short name of the page in the available text box in the *Object Selection* section (right side)
4. Press *Enter* on your keyboard. The full name of the page will appear in the *Description* column

Object	Description
FPAREQN	Requisition

5. Click the *Insert* button in the *Menu Maintenance* bar (see above)
6. Repeat the above steps to add additional pages
7. When finished, click the *Save* button at the bottom of the page
8. Log out and back into Banner. Click the *Applications* button in the global navigation menu.
9. The *My Banner* section will appear. Click to display and access your saved pages.



For those pages where a search is necessary to add, use the *Object Type* section on the left.

1. Use the drop-down menu to select the object type above the columns
2. Scroll through the list of pages that appear in the *Object Type* list
3. To select a page to save, double-click on the short name (description will display in a blue color) and click the *Insert Selection* button. The selected page will appear in the *Object Selection* section.

Object *	Description *
STVSOFF	A/F/I Fund Source Validation
STVGSTA	A/F/I Status Validation
STVTASK	A/F/I Task Validation
STVGTYPE	A/F/I Type Validation
SSAQCRCL	Academic Calendar Rule Query
STVACCL	Academic Calendar Type Validation
STVSIZE	Academic Dress Size Validation
STVTYPE	Academic Dress Type Validation
SHQSUBJ	Academic History Catalog Query
STVEVEN	Academic History Event Code Validation
SHQSECT	Academic History Section Query
SHANCRS	Academic Non-Course

Object	Description
FPAREQN	Requisition
STVSIZE	Academic Dress Size Validation

4. To remove a page, double-click on the page name in the *Object Selection* section (description will display in a blue color) and click the *Remove Selection* button.
5. Repeat Steps 1 through 4 to add additional pages
6. Click the *Save* button at the bottom of the page. The changes take effect on next login.

Note: If an inaccessible object is added to the *Object Selection* list, select that object and click *Tools | Clear Record* to remove. The error message will prevent the removal of the inaccessible object normally.