

# West Valley-Mission Community College District BANNER 9 NAVIGATION

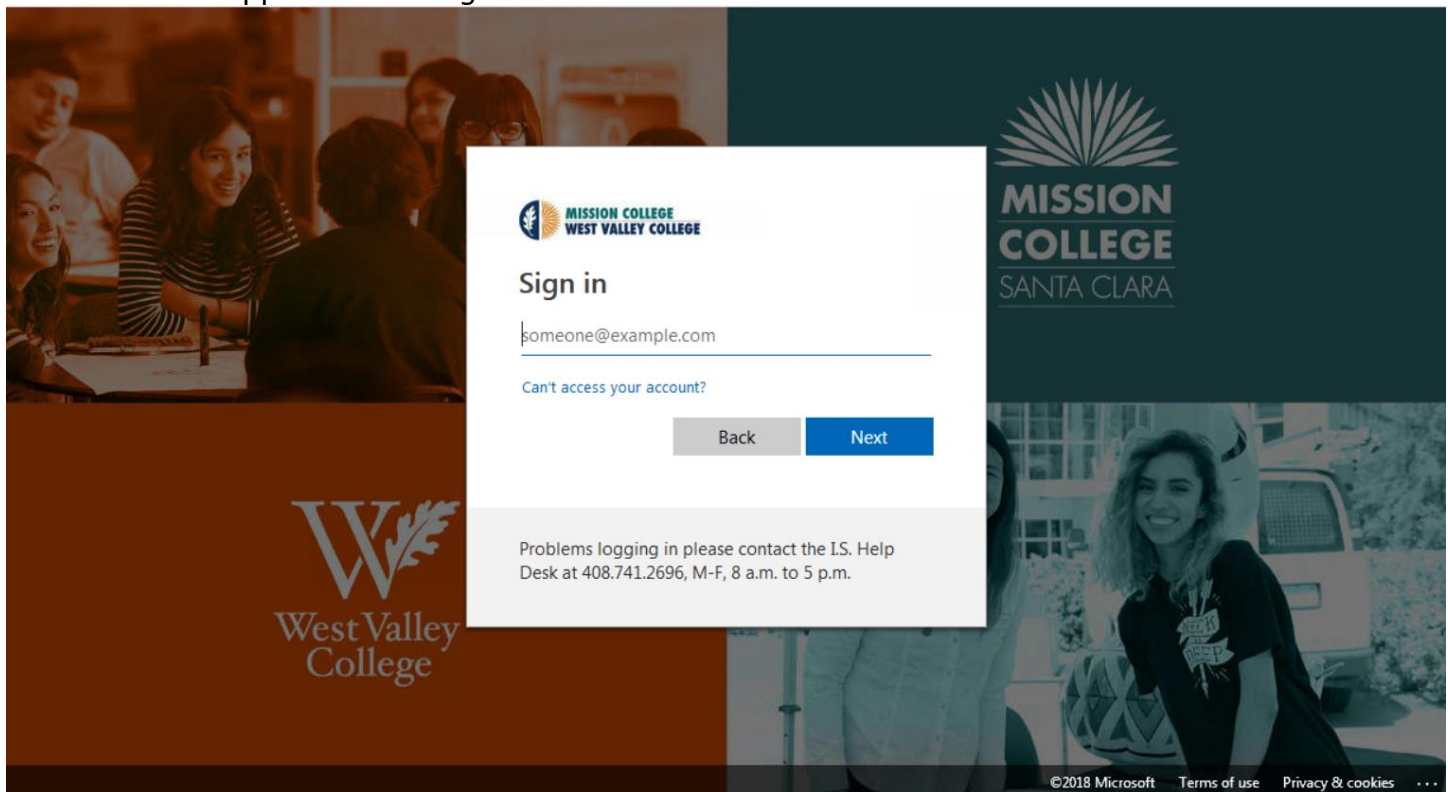
## **LOGIN into Banner 9 with Application Navigator:**

1. Browser Considerations:
  - a. Firefox and Chrome are recommended. Banner 9 is supported on Chrome (Windows only), Internet Explorer, Edge, Firefox (Windows and Mac), and Safari (Mac only). Some users have seen errors with Edge and poor performance with IE.
  - b. You are able to have multiple tabs with the same login or multiple browsers/Private Browsing windows with the same or different logins.
  - c. Banner 8 will still be accessed for certain limited forms. This will be available in Application Navigator when logged in with Internet Explorer.

## 2. **URL for BANNER 9 Portal**

<https://wvmccd.sharepoint.com/sites/Banner9/SitePages/Banner-9-Portal-Site.aspx>

Link to the Application Navigator in the DEVL instance.



## 3. **Login with your e-mail address and password (Active Directory)**

West Valley Employees: `Firstname.lastname@westvalley.edu`

Mission Employees: `Firstname.lastname@missioncollege.edu`

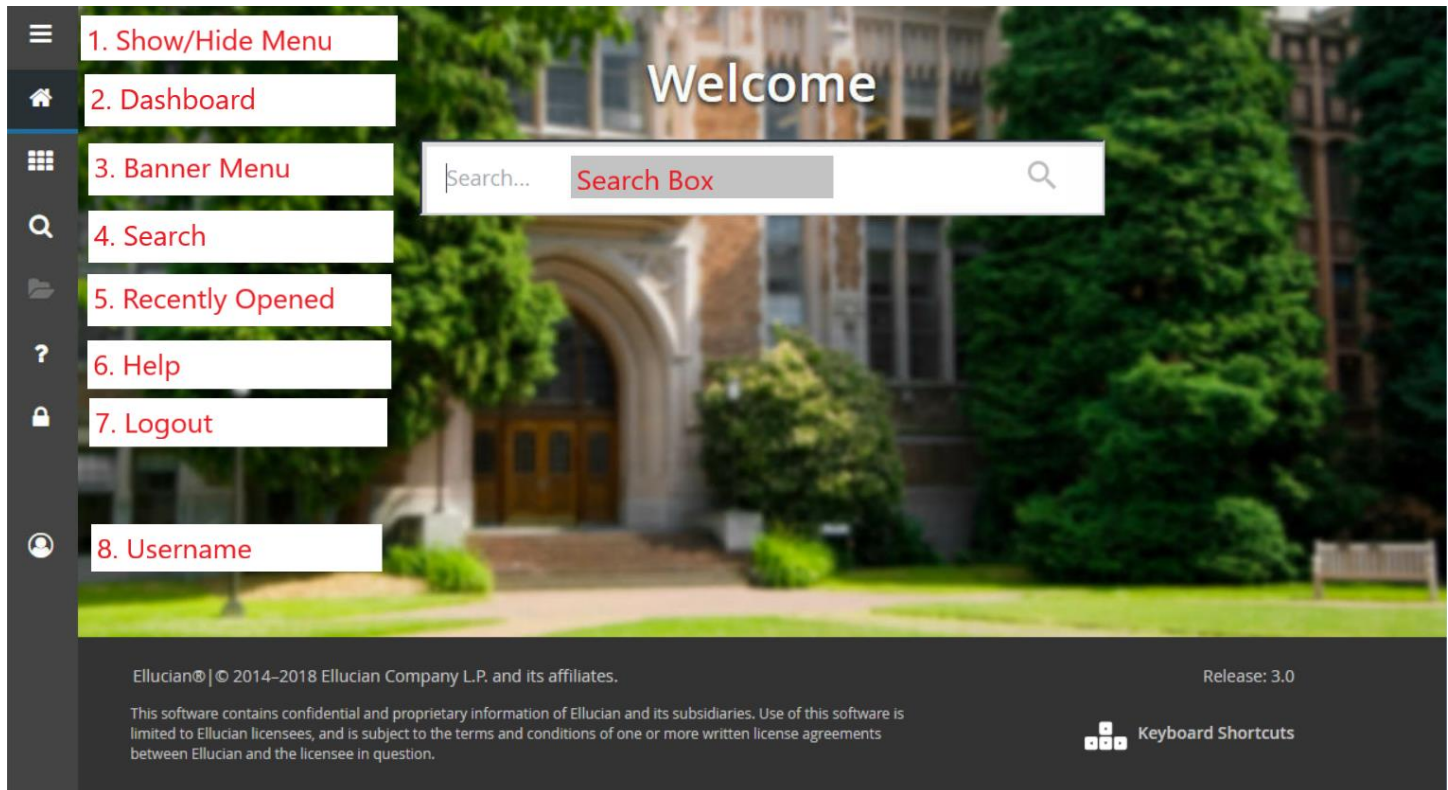
District Employees: `Firstname.lastname@wvm.edu`

Part Time Faculty, and Short Term Employees of all e-classes:

`firstname.lastname@wvm.edu`

## APPLICATION NAVIGATOR

“AppNav” is the home page or dashboard and provides the menu for Banner 9 pages.



### Menu Bar

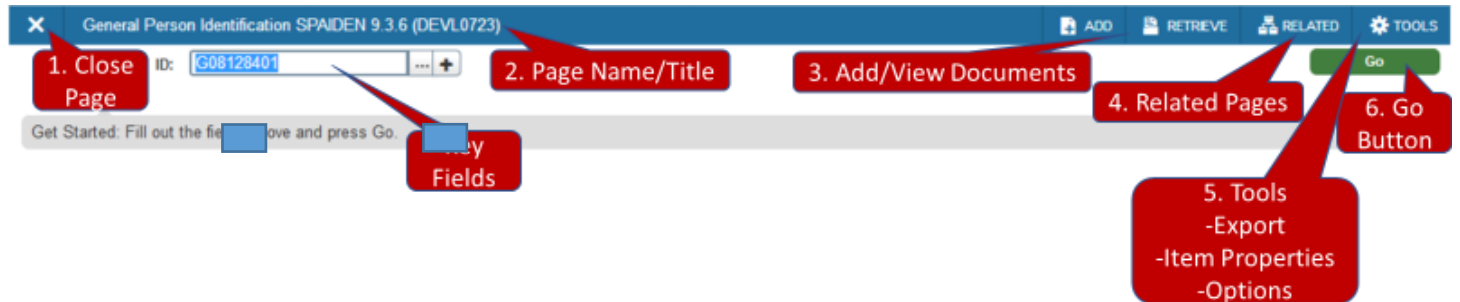
1. **Toggle Menu** expands and contracts the menu column. Banner menus open in a cascade by functional area. Find the page you are interested in opening and click. If you have set up a “My Banner” menu, that will also appear.
2. **Dashboard** (CTRL+SHIFT+X) is also Home or the Welcome page. It can be used from any page to return to the AppNav Dashboard/home page.
3. **Banner Applications Menu** (CTRL+M) opens the Banner menus by functional area. Find the page you are interested in opening and click.
4. **Search** (CTRL+SHIFT+Y) is used to search for an administrative page by entering either the Banner Acronym or the descriptive name of the page.
5. **Recently Opened** (CTRL+Y) displays with a count of pages after you have opened the first page. Open the list and select a page to access it.
6. **Help** (CTRL+SHIFT+L) can be selected from a functional page, selecting this icon will open the help information for the page you are in, if available. Help is not available for the AppNav Home Page.
7. **Logout** (CTRL+SHIFT+F) link in the Application Navigation Toolbar will exit you from your Banner portal applications.
8. **Banner User Name** displays name of the person currently logged in.

**Search Box** lets you enter either the descriptive name of the page or the 7-character Banner page name. It shows search results as you type to help identify the Page you are seeking.

## Banner 9 Changes to Terminology

Banner 8	Banner 9
Forms	Pages
Blocks	Sections
Next Block	Go
Rollback	Start Over
Query	Filter

## PAGE HEADER



1. **Close Page** (CTRL+Q) button.
2. **Page Title** / Name / Version / Instance
3. **ADD** (ALT+A) and **RETRIEVE** (ALT+R) Buttons are used with Banner Document Management.
4. **RELATED** (ALT+SHIFT+R) button displays a list of pages that can be accessed from this page like the Options Menu in Banner 8.
5. **TOOLS** (ALT+SHIFT+T) button includes refresh, export, print, clear data, item properties, and page options like the Banner 8 Options Menu. This also allows switching between Compact (default) and Expanded Page Layout, which impacts vertical whitespace on the page.
  - a. **Refresh** (F5)
  - b. **Export** (SHIFT+F1)
  - c. **Print** (CTRL+P)
  - d. **Clear Record** (SHIFT+F4)
  - e. **Clear Data** (SHIFT+F5)
6. **GO** (Alt+PgDn) to access the body of the page, populate the key block fields and then click **Go**.

**FILTERS** (F7) provide the ability to search for specific records by querying on data element, previously provided through search and execute query functionality.

The screenshot shows the 'PERSON SEARCH' interface with the following filter criteria:

- Last Name: Contains Wooster
- First Name: Starts With Bert

Buttons visible include 'Remove Criteria', 'Clear All', and 'Go'. Radio buttons at the bottom allow for 'Case Insensitive Query' (selected) or 'Case Sensitive Query'.

- Filter Criteria** provides the ability to select based upon field, function, and criteria.
  - Operator** can be Contains, Like, Starts With, Ends With, Equals, Not Equals
- Remove** button are used to remove a single criteria record.
- Clear all** (F7) to clear results and return to filter or **GO** (F8) to execute query.
- Basic versus Advanced Filtering** – New functionality with the Admin Common 9.3.12 release allows multiple filter modes:
  - Basic Filtering is the default and includes frequently-used fields with “Equal” as the function. This is very similar to Banner 8 capability for quickly searching records.
  - Advanced filtering is shown above includes all of the filter fields and criteria options.

**Basic Filter Example:**

The screenshot shows the 'OBJECT MAINTENANCE' interface with a 'Basic Filter' applied. The search results table is as follows:

Object *	Description *	Type *	System *	Data Extract Option *	Banner8/Banner9 Display Option *
FOAIDEN	Person Identification Form - Finance	FORM	F	Not Available	Unified Menu All (Ban8&Ban9)
FOIIDEN	Finance Person Search	FORM	F	Not Available	Unified Menu All (Ban8&Ban9)
FTIIDEN	Entity Name/ID Search	FORM	F	Not Available	Unified Menu All (Ban8&Ban9)

**Search Results Example:**

The screenshot shows search results for ID G08128403. The table below shows the details for the selected record:

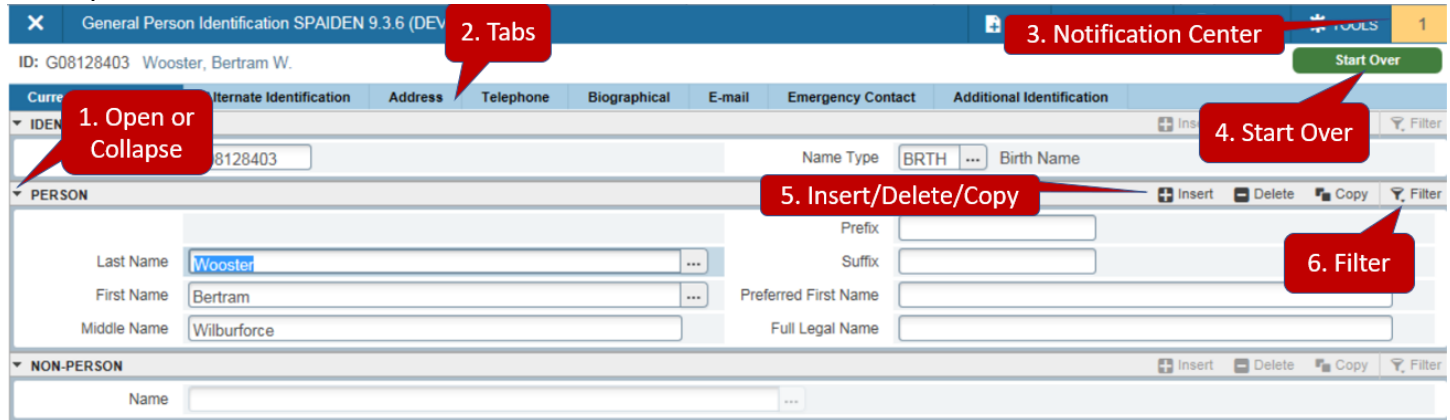
ID	Last Name	First Name	Middle Name	Birth Date	Change Indicator	Prefix	Suffix
G08128403	Wooster	Bertram	Wilburforce	10/01/83			

Buttons visible include 'Filter Again', 'CANCEL', and 'SELECT'.

When Filter is used to select an item (i.e. SOAIDEN) buttons will show:

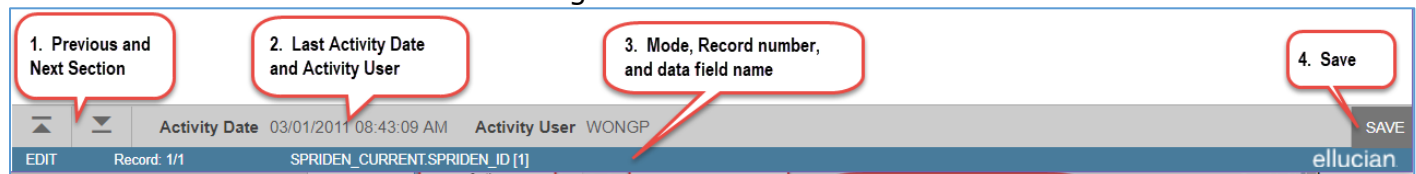
- **FILTER AGAIN** (F7)
- **CANCEL** (CTRL+Q)
- **SELECT** (ALT+S)

**SECTIONS** of the form will display after the key data has been entered and the **GO** button has been pressed.



1. **Open or Collapse** a section using the arrow on the far left side of the section header.
2. **Tabs** (CTRL+SHIFT+1, CTRL+SHIFT+2, etc.. using number represents the tab sequence) are available on some pages to access sections of grouped information.
3. **Notification Center** displays messages including errors. These are the types of messages that were in the lower left hand corner in Banner 8.
4. **Start Over** (Alt+PgUp) returns to the key block.
5. **Insert-Delete-Copy record icons** for the following actions:
  - a. **Insert** (F6) Use this to insert records in the section.
  - b. **Delete** (SHIFT+F6) Use this to delete records in the section.
  - c. **Copy**. (F3 or F4 to duplicate selected record in the section.)
6. **Filtering (F7)** is used to limit and identify records based upon search criteria. See the section above on Filtering.

**PAGE FOOTER** includes the following:



1. **NEXT** (ALT+PgDn) and **PREVIOUS** (ALT+PgUp) sections move up and down between sections and tabs.
2. Last Activity Date and User (if information is collected on the page/form.)
3. **SAVE** (F10) button
4. Additional information including:
  - a. **MODE** identifies edit (update) versus query mode.
  - b. **Record Number** identifies record number and total records.
  - c. **Data Field Name** identifies the Banner table and data field.

## DATA in GRID MODE

Transfer Institution Catalog Entry SHATATC 9.3 (DEVL)

Institution: 015235 CCC Chabot College Program: Default Institut

3. Sort by Column Heading

TRANSFERRING COURSE

Group	Primary	Term	Level	Subject	Course	Status	Title
20	<input checked="" type="checkbox"/>	197908	01	ENGLI	1B	AC	Comp & Reading
20	<input type="checkbox"/>	197908	01	ENGLI	1A	AC	Comp & Reading
80	<input checked="" type="checkbox"/>	200908	01	ESYS	60	AC	Electronic Systems Analysis
80	<input type="checkbox"/>	200908	01	ESYS	54	AC	Analog Circuit and Semi Device
H0	<input checked="" type="checkbox"/>	200608	01	HIST	8	AC	United States History Since Re
H0	<input type="checkbox"/>	200608	01	HIS	7	AC	United States History Until Re
	<input type="checkbox"/>	197508	01	TRENGLI	1A	AC	Comp & Reading
	<input type="checkbox"/>	197908	01	BUSIN	77A	AC	Shorthand I
	<input type="checkbox"/>	197908	01	BUSIN	77B	AC	Shorthand II
	<input type="checkbox"/>	197908	01	ENGLI		AC	Comp & Reading

1. Page Count and Records per Page (1 of 409, 10 Per Page)

2. Total number of Records per Page (Record 1 of 4088)

Course Details

Equivalent Exists	Credits Low	Credits High	Minimum Grade	Catalog	Protect from Import
<input checked="" type="checkbox"/>	4.000	4.000			<input type="checkbox"/>
<input type="checkbox"/>	3.000	3.000			<input type="checkbox"/>
<input checked="" type="checkbox"/>	2.000	2.000			<input type="checkbox"/>
<input checked="" type="checkbox"/>	2.000	2.000			<input type="checkbox"/>

1. **Page Count** indicates the number of total pages. **Records per Page** manage the number of records displayed.
2. **Record Count** indicates the record highlighted as a count within the total number of records.
3. **Sort Order** – in Grid mode, click on header name.
4. Record data can continue to a section below or require scrolling to the right.

## OTHER BASIC NAVIGATION HINTS

1. Functionally, Banner 8 and Banner 9 are mostly the same. The appearance and navigation has changed, but the structure and function have not. Experience shows that users quickly adapt once they start regularly using Banner 9.
2. Asterisk "\*" indicates a required field.
3. Dates can be identified by calendar icon which will open a pop-up. "T" can be entered to default in today's date, just like Banner 8.
4. Name search can be performed by tabbing through the blank ID field. A box will pop up where a name can be entered in last, first name format. If not found, other options are presented.
5. "..." next to a field will bring up the list of values or search options.
6. Multiple Records are identified by the record count in page footer.
7. **Single** and **Multiple** record icons will show before the "Insert" icon on administrative pages that display in either grid mode with multiple records or a single record at a time.
8. Quickflows are executed from the page, "GUAQFLW".
9. Banner 8 INB – Recommend opening Banner 8 forms from a separate Internet Explorer tab.

## KEYBOARD SHORTCUTS

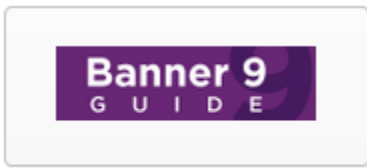
ACTION	Banner 9	Banner 8
Choose / Submit	ENTER	ENTER
Clear record	SHIFT+F4	SHIFT+F4
Clear records (all in a section)	SHIFT+F5	SHIFT+F5
Delete Record	SHIFT+F6	SHIFT+F6
Down or Next Record	Down Arrow	Down Arrow
Duplicate selected record	F4	F4
Exit Current Page or Exit Search	CTRL+Q	CTRL+Q
Expand/Collapse Drop-down field	ALT+Down Arrow	Click field
Export Data	SHIFT+F1	On menu only
First Record	CTRL+Home	Not applicable
Filter/Query Open	F7	F7
Filter/Query Execute	F8	F8
Help	CTRL+SHIFT+L	On menu only
Insert/Create Record	F6	F6
Last Record	CTRL+End	Not applicable
Lookup or List of Values (LOV)	F9	F9
Next Field or Item	Tab	Tab
Next Page Down	Page Down	Page Down
Next Section / Go	ALT+Page Down	CTRL+Page Down
Open Menu Directly	CTRL+M	F5
Open Related Menu	ALT+SHIFT+R	Not applicable
Open Tools Menu	ALT+SHIFT+T	Not applicable
1 <sup>st</sup> Tab 2 <sup>nd</sup> Tab and so on	CTRL+SHIFT+1 CTRL+SHIFT+2 and so on	Not applicable
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
Save	F10	F10
Select record on a Called Page	ALT+S	SHIFT+F3
Start Over or Rollback	F5	SHIFT+F7
Toggle Multi/Single Records View	CTRL+G	Not applicable
Up/Previous record	Up Arrow	Up Arrow
Workflow		
Release Workflow	ALT+Q	Icon or Menu
Submit Workflow	ALT+W	Icon or Menu
Banner Document Management		
Add BDM Documents	ALT+A	Icon or Menu
Retrieve BDM Documents	ALT+R	Icon or Menu

ACTION	Banner 9	Banner 8
Application Navigator		
AppNav - Access Help	CTRL+SHIFT+L	
AppNav - Access Menu	CTRL+M	
AppNav - Recently Opened pages	SHIFT+Y	
AppNav - Search	CTRL+SHIFT+Y	
AppNav - Sign Out	CTRL+SHIFT+F	

**MORE INFORMATION**

Download *Banner Transformed – Getting Started with your Administrative Applications* from the Ellucian Support Center.

View the *Banner 9 Guide* web site from the Ellucian Hub.



Banner 9 Guide