



Banner 9 Basics

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Banner 9 Basics

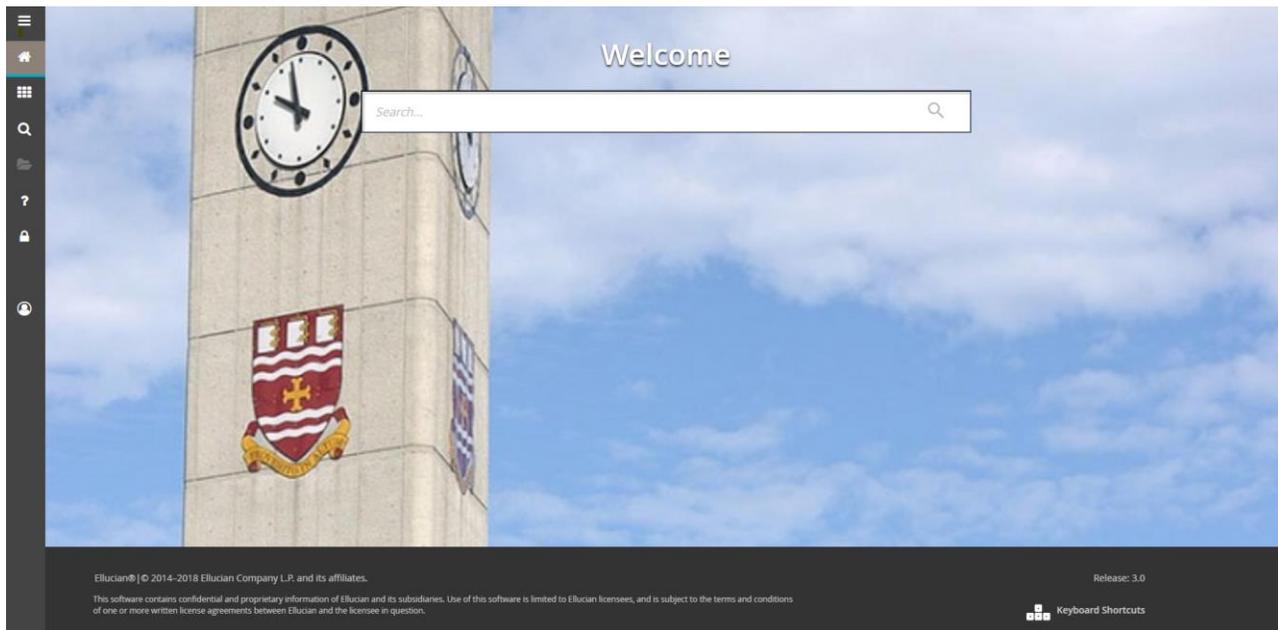
Last updated: 10/5/2018

Information in this document is subject to change without notice.

Introduction

Banner 9 includes the same functionality as in Banner 8 INB but in an enhanced Web based interface with a new look and feel. Further, Banner 9 no longer has a dependency on Java software and runs optimally in a Google Chrome browser (Internet Explorer is not recommended for Banner 9).

Home Page

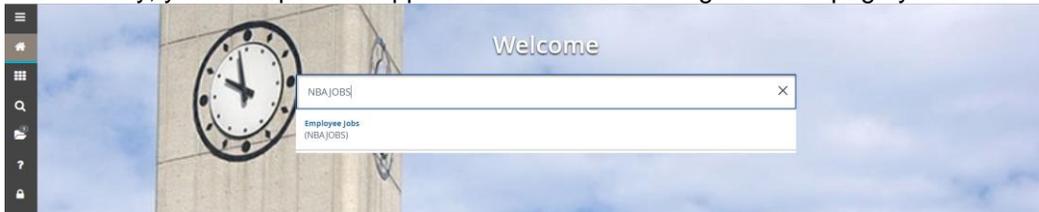


Button	Button Name	Button Description
	Toggle Menu	Click to display or hide the names of the Application Navigator icons. Click the Menu icon or the Back to Main Menu link to display the main menu on any screen.
	Dashboard	Click to return to the landing page.
	Applications	Click to display the Banner, My Banner, and Banner Self-Service menus, in addition to menus for any other integrated applications such as Banner 9 Registration.
	Search	Click to initiate a search to find pages or forms using key words or the seven letter object identifier for the form or page. This search is performed on the menu data, therefore if the form or page is not included on the menu, it is not included in the search results.
	Recently Opened	Click to list forms that you have recently opened. When a new page is opened, the number attached to the folder increases by one. When selected, the recently opened button displays a list of the recently opened forms and pages.
	Help	Click to display the online help for Banner 9 administrative applications.

Button	Button Name	Button Description
	Sign Out	Click to log out of Application Navigator. It is important to remember to use the Sign Out link in the upper right corner when closing the application instead of just closing your browser to make sure you are logged out of the application.
	Current User Logged on	No Current Function
	Keyboard Shortcuts	Click to review the available keyboard shortcuts in Application Navigator.

► **To open a page:**

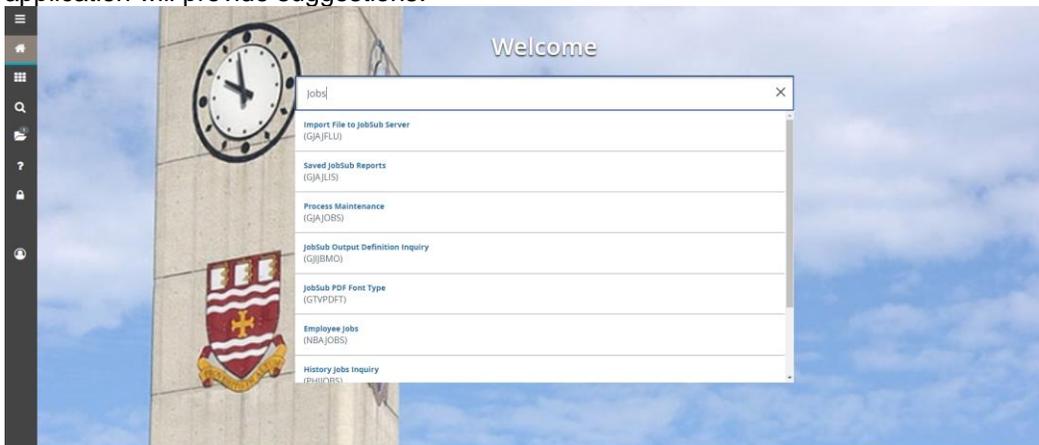
1. On the Home page, click on the **Search** box and enter the page name into the search box. Alternatively, you can open the Applications menu and navigate to the page you are looking for.



2. Press the **Enter** key. This will open the form. Alternatively, you can click the name of the form to open.

► **To search for a page:**

1. On the Home page, click on the **Search** box enter the page name that you are looking for. Alternatively, you can or key text that you think is in the name of the form. As you are typing, the application will provide suggestions.



2. Click the name of the page to open.

Basic Page Navigation

The basic navigation of each page includes the page header, notification center, key block, Sections, and buttons.

Page Header



The page header contains the following items:

- Page close icon
- Page title, which is formatted according to the preferences established on the User Preference (GUAUPRF) page.
- Release and Submit buttons, which are used only with a workflow.
- Add and Retrieve buttons (Not applicable at MUN), which are used with Banner Document Management.
- Related Menu, which displays a list of pages that can be accessed from this page. These are defined on the Options Maintenance Menu (GUAOPTM) page.
- Tools Menu, which includes refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.
- Notification Center. This is located to the right of the Tools menu and displays the following types of information as needed:
 - Successful save of data
 - Warning messages
 - Error messages
 - Informational messages
 - Number of messages to be corrected to continue in the page

You can click in the box with the number in the page header to open or close the Notification Center.

Key Block



The first block on most pages contains key information. The key block determines what data is entered or displayed on the rest of the page. All the information on the page is related to the key block. The key block stays on the page as subsequent sections are displayed.

When the cursor is in the key block, the fields that can be entered in the key block are enabled. When you leave the key block, the fields in the key block are disabled.

► **To access the body of the page:**

1. Populate the key block data.
2. Click **Go**.

► **To return to key block of the page:**

1. On the top right of the page, click the **Start Over** button.

Sections

Employee PEAEMPL 9.3.6 (bantst9) ADD RETRIEVE RELATED TOOLS
 ID: 200937111 Dr Glen Aaronson Start Over

General Employee United States Regulatory Canadian Regulatory

EMPLOYEE Insert Delete Copy More Information Filter

General Employee
 Employee Status * Active
 Employee Class * 2S Retiree/Survivor
 Employee Group RTRE Retiree
 Leave Category * NA No Accrual
 Benefit Category * R1 Retirees
 Part or Full Time * Other
 Status
 Allow New Hire Benefits Enrollment

Home Department
 COA * M
 Organization * 90000 Pension Fund

Check Distribution
 COA * M
 Organization * 90A Pension Fund

Employee District
 District or Division

Service Dates
 Current Hire * 09/01/2002
 Original Hire * 09/01/1984
 Adjusted Service * 09/01/2002
 Seniority * 09/01/2002
 First Work Date 09/01/2002
 Last Work Date

Termination
 Reason
 Termination Date

Leave of Absence
 Reason
 Begin Date
 End Date

Hiring Location
 Location
 Campus
 College

Pages are divided into sections that contain additional details for the key information. A section can represent one record or multiple records depending on the type of information that you are working on. Each section contains related information.

Sections of data are accessed by scrolling up and down the page. They can be opened or collapsed by clicking on the arrow on the far left side of the section header. Some sections are accessed by using tabs that group information in a meaningful way.

If available, the sections can have a header that includes icons for the following actions:

Button	Button Name	Button Description
	Insert	Use this to insert records in the section.
	Delete	Use this to delete records in the section.
	Copy	Use this to copy records in the section.
	More Information	More Information. Use this if supplemental data can be entered for a section. The More Information icon is displayed as a blank page if supplemental data can be entered for the record. The icon is displayed as a page with lines if supplemental data already exists for the record. If supplemental data cannot be entered for a section, the icon is not displayed. Refer to Supplemental Data Engine for more details.
	Filter	Use this to filter records in the section.
	Expand	Use this to expand a section.
	Collapse	Use this to collapse a section.

Other Buttons

Button	Button Name	Button Description
	Close	Click to close a page.
	Start Over	Click to rollback a page to the key block and start over. Equivalent to the Rollback functionality in Banner 8.x.
	Save	Click to save changes to a page.
	Previous Section	Click to navigate to the next section on a page. Equivalent to the Next Block functionality on a form in Banner 8.x.
	Next Section	Click to navigate to the previous section on a page. Equivalent to the Previous Block functionality on a form in Banner 8.x.
	Search	Click to open a lookup search associated with a field.
	Release	Banner Workflow
	Submit	Banner Workflow
	Add	(Not applicable at MUN) Banner Document Management.
	Retrieve	(Not applicable at MUN) Banner Document Management.
	Related Menu	Click to display a list of pages that can be accessed from this page. These are defined on the Options Maintenance Menu (GUAOPTM) page.
	Tools	Click to access the Tools Menu, which includes refresh, export, print, clear record, clear data, item properties, display ID image, and other options controlled by the page.

Page Layout

There are two different page layout options to choose from.

- Compact (default) - This layout reduces the amount of excessive white space on pages and increases the amount of information visible on a page, limiting the need to scroll vertically.
- Expanded - This layout displays pages with increased white space and reduces the amount of information visible on a page. This may result in the need to scroll to see all of the information.

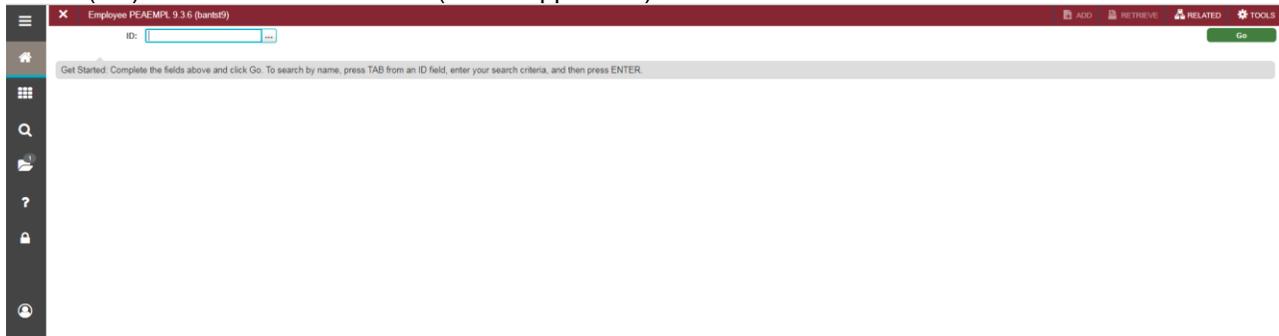
► To switch between Compact page layout and Expanded page layout:

1. Open the Tools menu.
2. Under the Page Layout section, click **Expanded** or **Compact**.

The page layout that you select remains active for your browser session. When you close your browser, the page layout reverts to the default Compact the next time you open a new browser session and log in to Application Navigator.

Look Up Values

Many fields in Banner 9 are populated using a look up. To lookup a value for a field, click the Search button (🔍) associated with the field (where applicable).



Filter

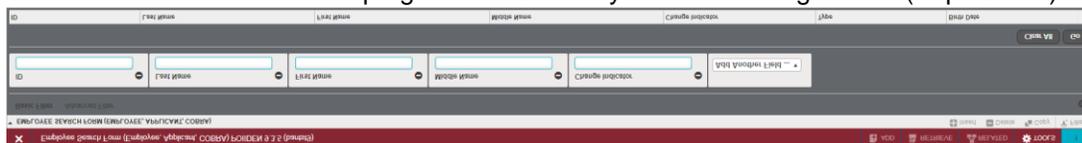
Banner offers an option to filter results on most pages. There are two types of filtering available in Banner:

Basic Filter

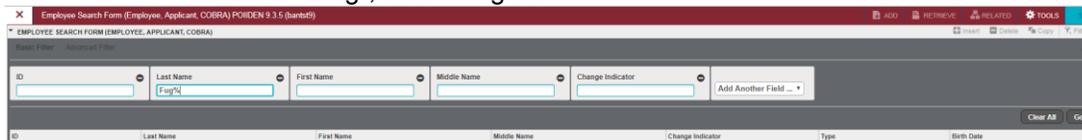
You can filter data in a section if there is an active Filter icon in the section header.

► To run a basic filter:

1. Click the **Filter** button at the top right of the section you are choosing to filter (or press F7).



2. Enter the filter details. For example, on the Employee Search page of PEAEMPL, to search for a last name that starts with “Fug”, enter “Fug%”.



3. On the bottom right of the filter section, click **Go** to execute the filter.

Notes:

- If you want to add another field to the filter criteria, choose a field from the Add Another Field option, select an operator, and enter a value for the field that you selected. Repeat this step until all filter criteria are entered.
- The number of records retrieved is displayed at the bottom of the section. The results for a field can be sorted in ascending or descending order by clicking on the field label in the column header. You can reverse the sort order by clicking the field label.
- If you want to perform another filter, click **Filter Again**.
- If you want to close the filter and display all unfiltered records, click the lowercase in the upper right corner of the filter window to close the filter.
- You can use “%” as a wild card for zero or more characters or a “_” as a wild card character for one and only one character. For example, to search for a last name that starts with “Fug”, enter “Fug%”.

Advanced Filter

In sections where filtering is available you can choose to run advanced filter to apply more flexible logic to filtering data.

► To run an advanced filter:

1. Click the **Filter** button at the top right of the section you are choosing to filter (or Click F7).

The screenshot shows the 'Advanced Filter' interface for the 'Job Detail' section. The top navigation bar includes 'Base Job', 'Job Detail', 'Payroll Default', 'Deferred Pay', 'Miscellaneous', 'Excluded Deductions/Benefits', 'Default Earnings', 'Work Schedules', and 'Job Labor Distribution'. The 'Filter' button is visible in the top right corner. The main area displays job details for Mr. Laurel Moreno, including fields for Effective Date, Personnel Date, Status, Title, Job FTE, and Encumbrance Hours. A table below shows compensation details such as Rate, Hours per Pay, Assign Salary, Factor, Pays, and Annual Salary.

2. At the top left of the section, click Advanced Filter.
3. Choose the fields that you want to filter by including the filter operator. The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other).

The screenshot shows the 'Advanced Filter' interface with a dropdown menu open for selecting operators. The dropdown menu lists various operators such as 'Equals', 'Not Equal', 'Not Equal or IS NULL', 'Between', 'Greater Than', 'Greater Than or Equal', 'Less Than', 'Less Than or IS NULL', 'Less Than or Equal', 'Less Than or Equal or IS NULL', 'IS NULL', and 'IS NOT NULL'. The 'Effective Date' field is selected, and the operator 'Equals' is chosen. The 'Personnel Date' field is also selected, and the operator 'Not Equal or IS NULL' is chosen. The 'Status' field is selected, and the operator 'Between' is chosen. The 'Title' field is selected, and the operator 'Less Than or Equal' is chosen. The 'Job FTE' field is selected, and the operator 'Less Than or Equal or IS NULL' is chosen. The 'Add Another Field ...' option is also visible.

4. Enter a value for the field that you selected.
5. Optional: If you want to add another field to the filter criteria, choose a field from the Add Another Field option, select an operator, and enter a value for the field that you selected. Repeat this step until all filter criteria are entered.
6. When all filter criteria are entered, click Go to display the filter results.
The number of records retrieved is displayed at the bottom of the section. The results for a field can be sorted in ascending or descending order by clicking on the field label in the column header. You can reverse the sort order by clicking the field label.

Sort

In a grid layout, values for a field can be sorted, and if you have chosen to sort the data, an up or down arrow next to the field name indicates the current sort order for the field. You can click the field label to reverse the sort order.

Print

Most pages in Banner 9 can be printed.

► **To print a page:**

1. Open the page that you want to print.
2. Click **CTRL + P**.
3. OR
4. Click **Tools**  and then **Print**.

Help

Help is available for most pages in Banner. You can perform various actions in the help suite. For example, you can search for topics or print the information.

► **To access Help:**

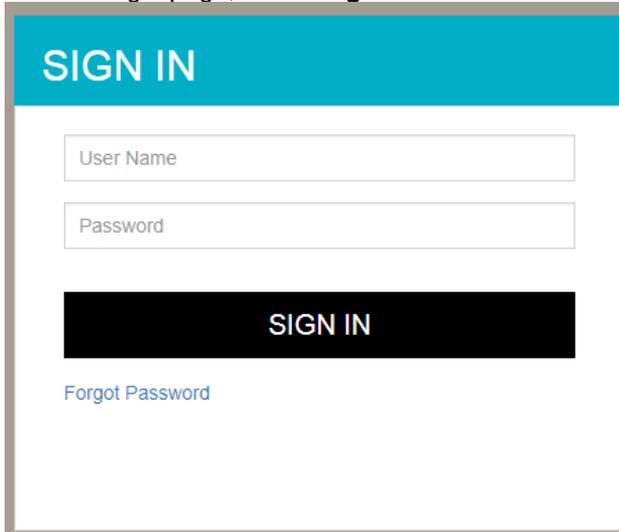
1. Click on the **Help** button  in the Application Navigator to open the help for the page in context.
OR
2. Click **CTRL+SHIFT+L**.

Password Reset

In Banner 9, users can now reset their password without contacting HR.

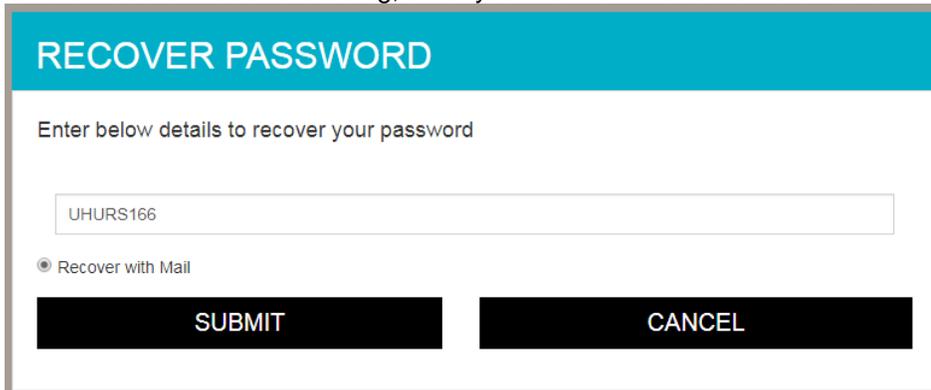
► **To reset your password:**

1. On the login page, click **Forgot Password**.



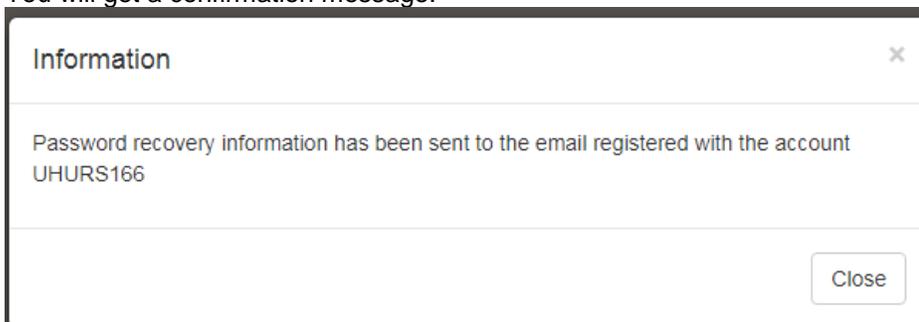
The screenshot shows a login form with a teal header containing the text "SIGN IN". Below the header are two input fields: "User Name" and "Password". A black button with the text "SIGN IN" is positioned below the input fields. At the bottom left of the form, there is a blue link labeled "Forgot Password".

2. On the Recover Password dialog, enter your Banner ID and then click **Submit**.



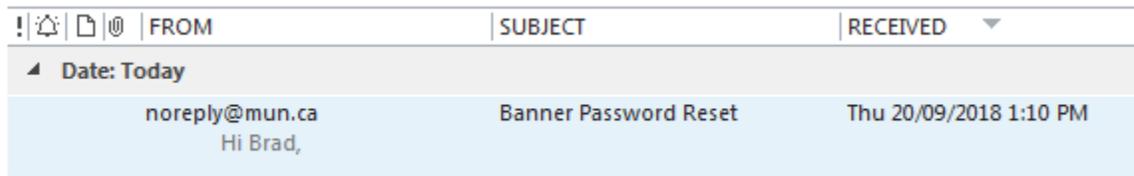
The screenshot shows a "RECOVER PASSWORD" dialog with a teal header. Below the header, the text "Enter below details to recover your password" is displayed. A text input field contains the value "UHURS166". Below the input field, there is a radio button labeled "Recover with Mail" which is selected. At the bottom of the dialog, there are two black buttons: "SUBMIT" and "CANCEL".

You will get a confirmation message.



The screenshot shows an "Information" dialog box with a close button (X) in the top right corner. The main text of the dialog reads: "Password recovery information has been sent to the email registered with the account UHURS166". A "Close" button is located in the bottom right corner of the dialog.

- You should get an email with a subject Banner Password Reset. Open this email and click the embedded link.



- This will open a Reset Password Dialog. Enter (and confirm) your new password and then click **Submit**.

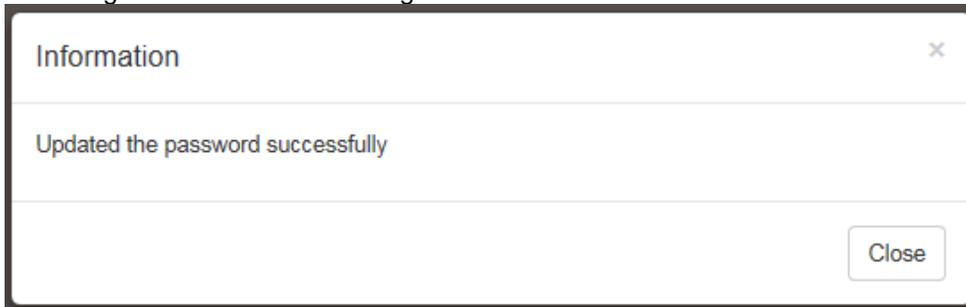
RESET PASSWORD

Enter New Password *

Confirm password *

SUBMIT

You will get a confirmation message.



You will also get a confirmation email.

noreply@mun.ca **Your Banner Password Reset successfully**
Hi Brad,

- Click **Close**.
- Close the application window and return to the original login page to continue logging on.

Glossary

Term	Definition
Go	Referred to as “Next Block” in Banner 8.x.
Internet Native Banner (INB)	Refers to the Banner 8.x web-based interface used by MUN administrative staff to perform the tasks for which they are responsible. It is not used by students or faculty.
Page	Referred to as a “Form” in Banner 8.x.
Section	Referred to as a “Block” in Banner 8.x.
Start Over	Referred to as “Rollback” in Banner 8.x.

Frequently Asked Questions (FAQs)

Q: How do I add wild card characters when searching in Banner 9?

A: The percentage sign (%) can still be used to represent zero or more characters in Banner searches although many searches no longer require a wild card. Entering any characters will assume that a wild card is attached to both sides of the test string.

Q: How do I log off of Banner 9?

A: You should always click the **Sign Out** button  on the left side of the page to log out. It is important to remember to use this link when closing the application instead of just closing your browser to ensure that you have logged out of the application.

Q: I cannot add a new record and the Insert button is greyed out. What do I do?

A: In some screens in Banner 9, you need to press your Down Arrow button to create a new record in a section.

Q: Where is the Help menu?

A: The Help menu has been removed in Banner 9. All relevant items that were in this menu are now located under the Tools menu.

Q: The text is very small and difficult to read. Can I change this?

A: Since Banner 9 is a Web-based application, you can change the font size in the browser settings. In Google Chrome, click the **Customize and Control Google Chrome** button  and then adjust the Zoom level. Alternatively, hold your CTRL button and then move your Mouse wheel to increase/decrease the font size. Release the CTRL button when you have reached the desired size.