Banner 9 Training

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Training Overview

- Introductions
- Reason for Training:
  - *Banner 8 INB access ends: 12/21/18*
- Banner 8 vs 9 differences
- Upcoming changes
- Records specific Forms
- Admissions specific Forms
- Further Training
- Questions / Support

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Banner 8 vs 9

- Banner 9 offers:
  - Navigation & layout like a webpage
  - Easier form name search
  - Mobile & tablet friendly

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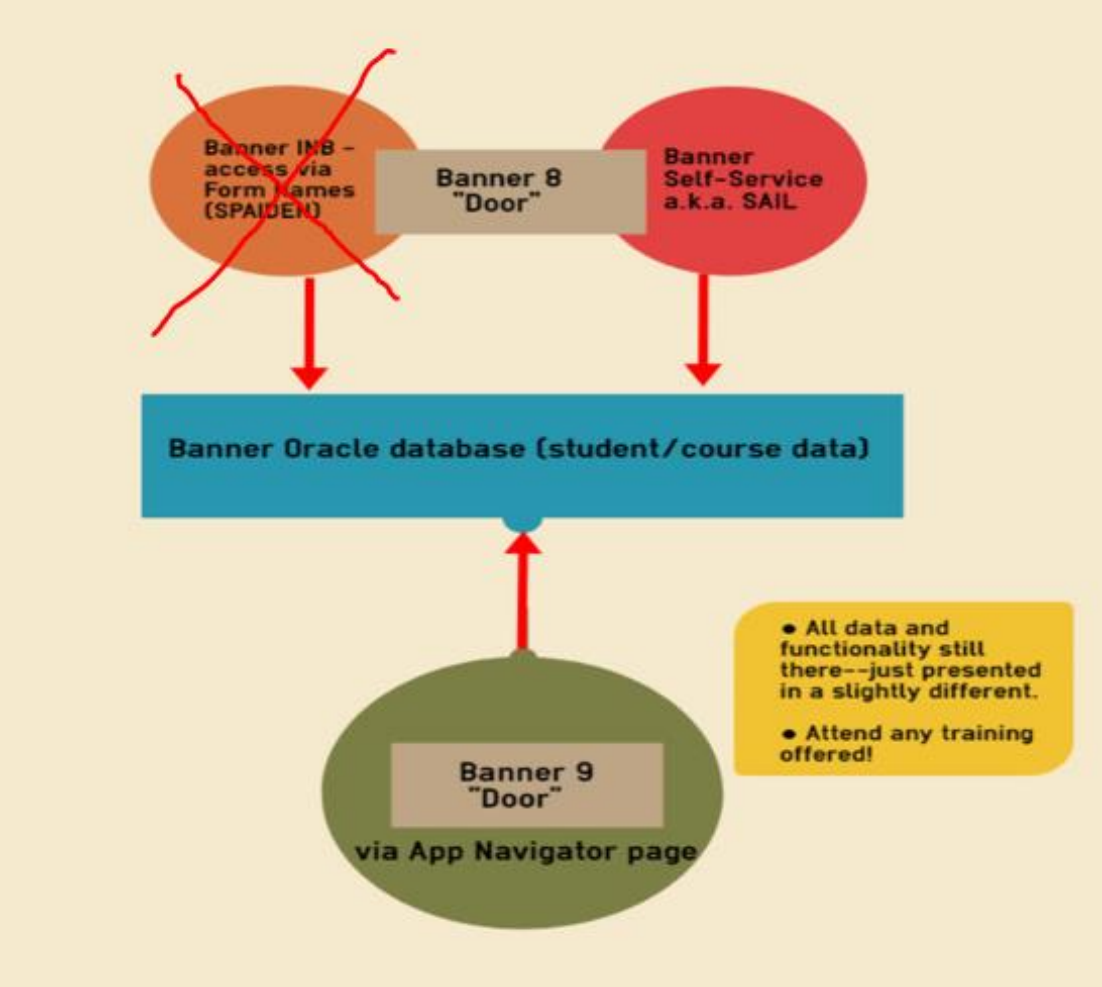
What's changing…



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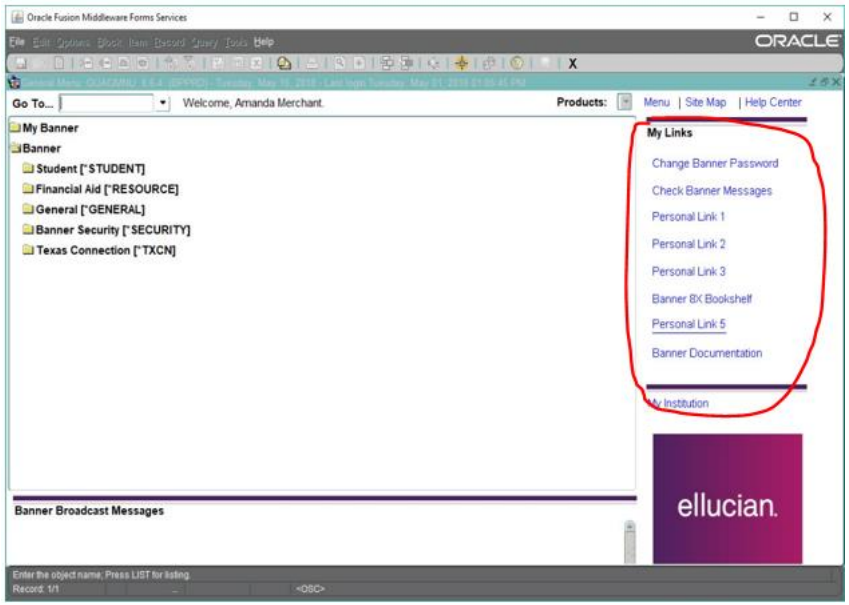
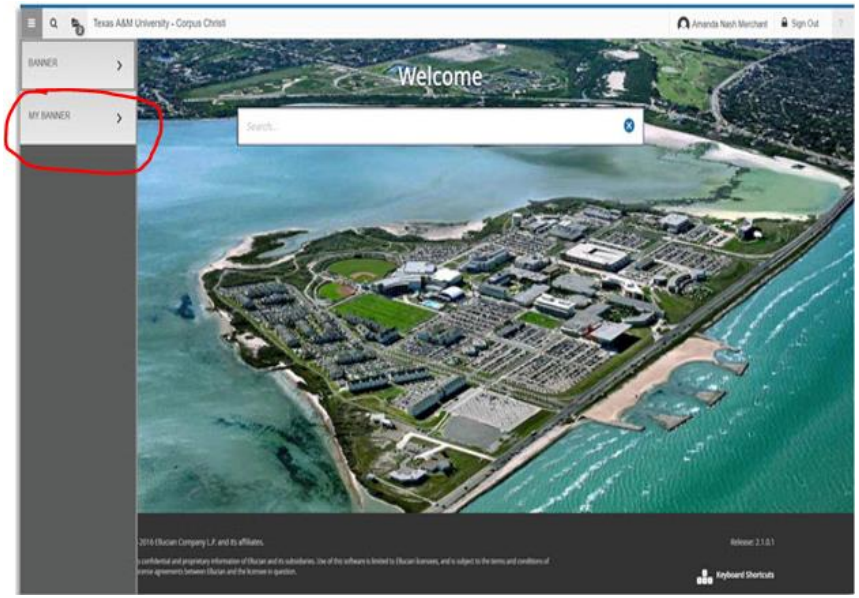
Landing page & Menu

Banner 8



Banner 9



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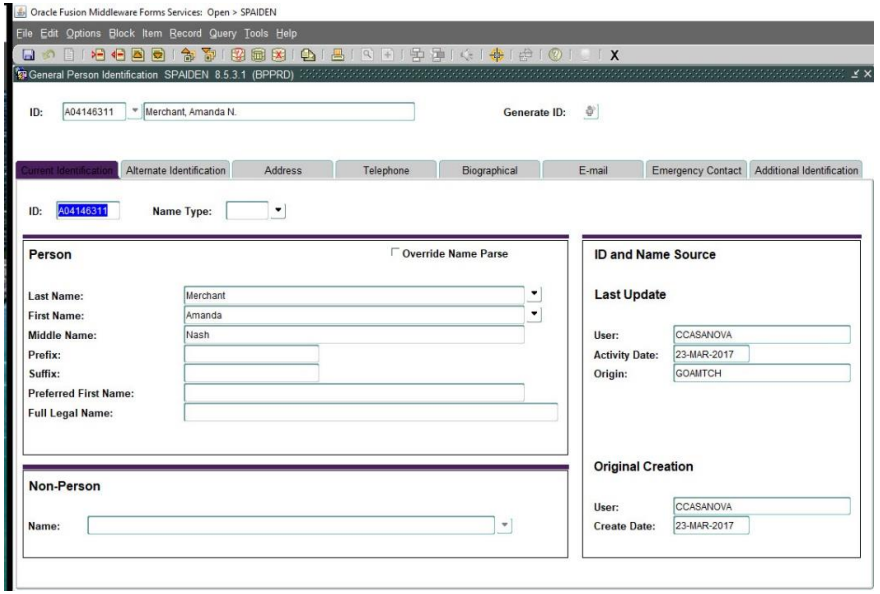
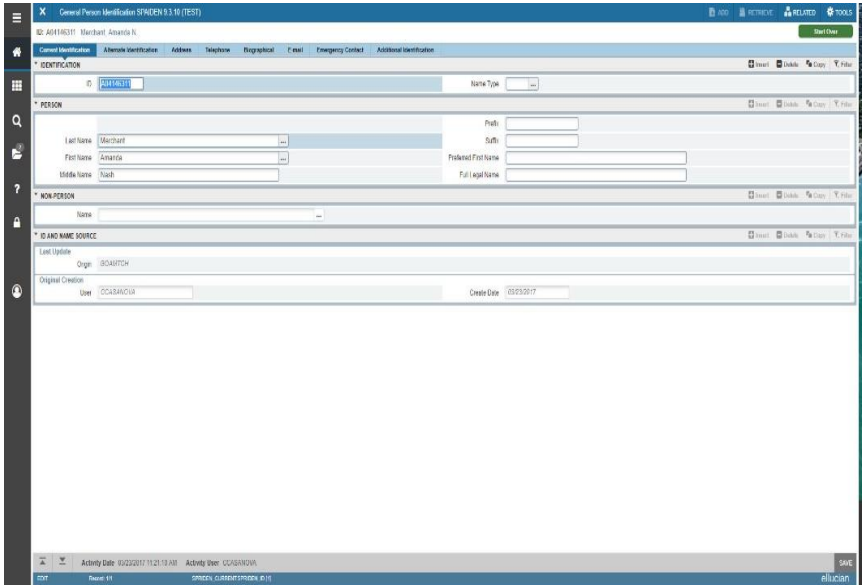
Banner 9 Page layout

Banner 8



Banner 9



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Terminology & Shortcut Key changes

BANNER 8	***BANNER 9***
Banner INB	Banner ***AppNav***
Form	**PAGE**
Block	**SECTION**
Next Block (action)	**GO** (button)
Rollback (action)	**Start Over** (button)
Query	**FILTER**
Next Block shortcut key:	
Control + Page Down	**ALT** + Page Down
Previous Block shortcut key:	
Control + Page Down	**ALT** + Page Down
Rollback / Refresh	
Shift F7	**F5**

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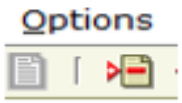
Toolbar & button changes

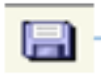
Banner 8 (instead of):

Next Block:

Rollback:

Remove Record:

Options: 

Save (at top menu bar): 

File:

Down arrow (search):

Banner 9 (do now):

Go:

OR

Start Over:

Delete:

Related:

Save (bottom right):

Tools:

Search on a field:

Bottom right:

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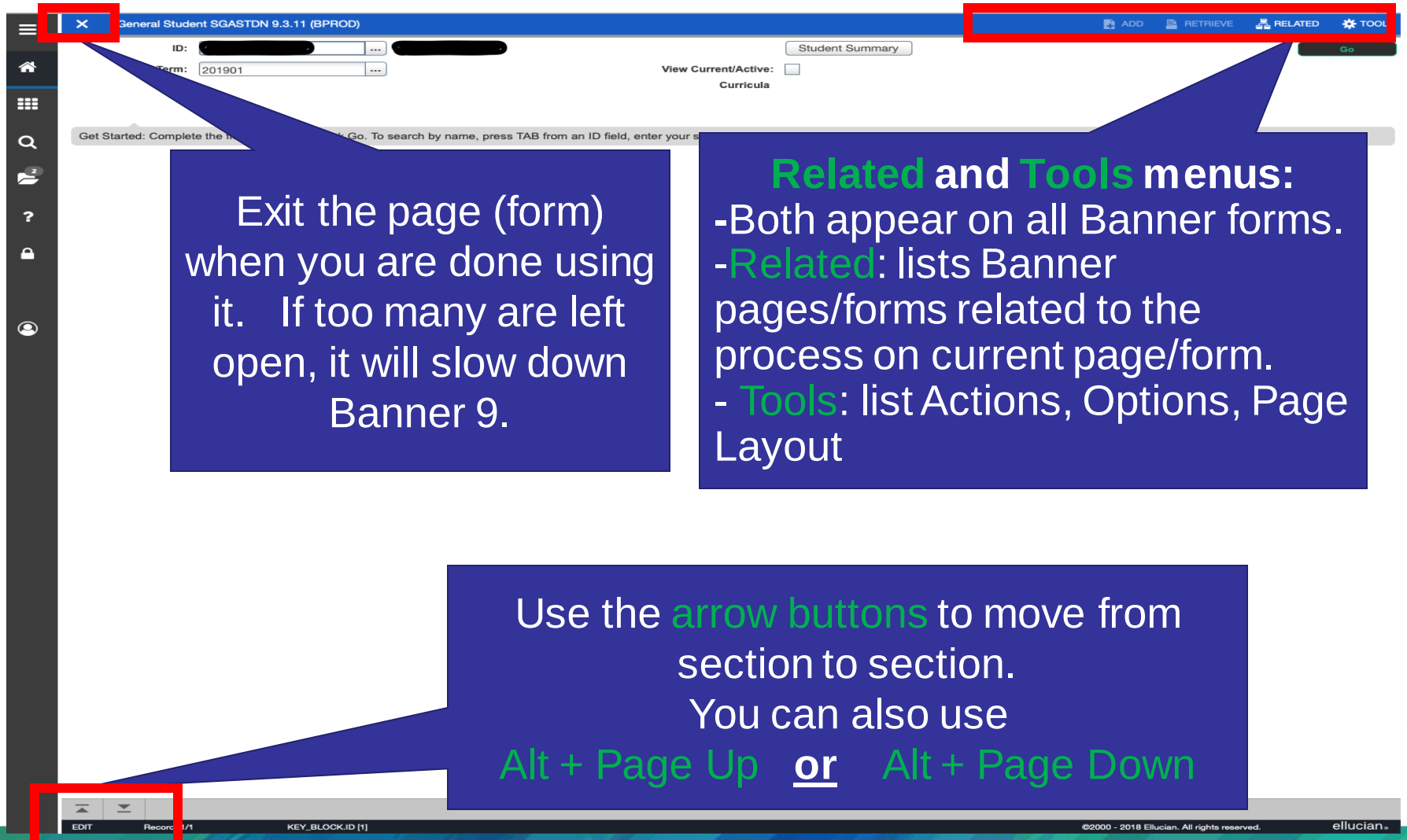
General Tips & Tricks



Exit the page (form) when you are done using it. If too many are left open, it will slow down Banner 9.

Related and Tools menus:
-Both appear on all Banner forms.
-Related: lists Banner pages/forms related to the process on current page/form.
- Tools: list Actions, Options, Page Layout

Use the arrow buttons to move from section to section.
You can also use
Alt + Page Up **or** Alt + Page Down

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General Tips & Tricks

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Coming soon….

- Fine Grain Access for Business Unit holds
  - *Currently being setup. Once in place, you will be able to add/end holds as yourself instead of logging into a service account (“COEDHOLD”).*
- Banner 9 Self Service or “SAIL”
  - *More modern looking interface*
  - *Mobile friendly*
  - *Rollout probably over the next year or more*

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Registrar Forms

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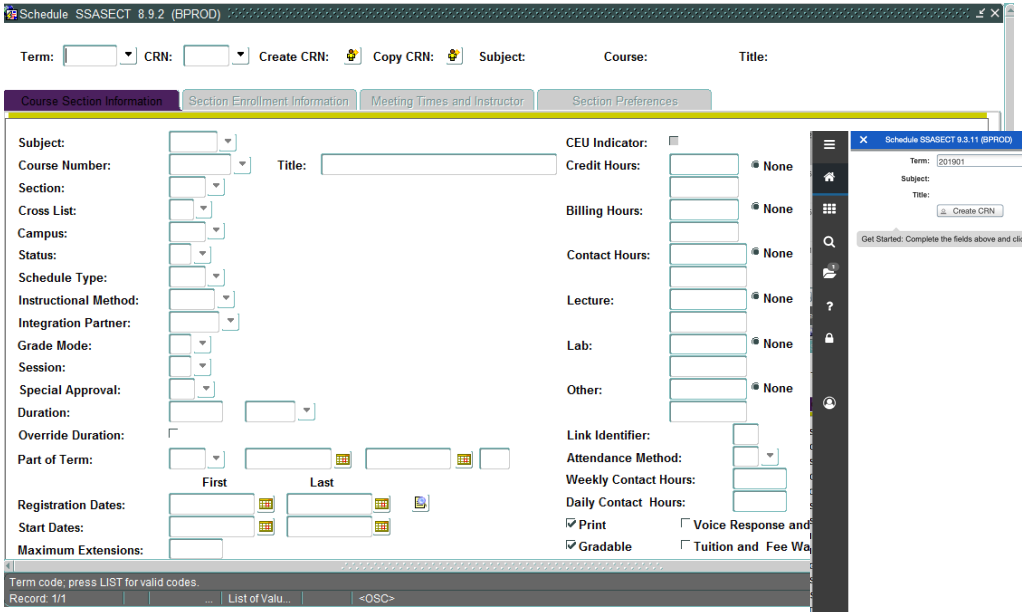
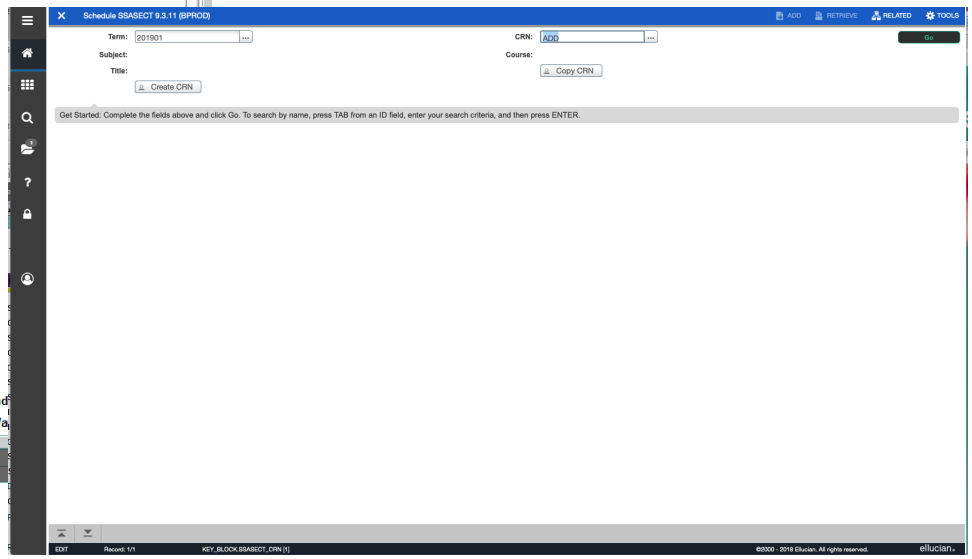
Banner Admin Pages

- Page displays have changed. The traditional Banner 8 form displayed many parts of a Banner form including the menu bar, the toolbar, the key block, etc. The page display in Banner 9 has changed. The initial display when accessing a page in Banner 9 presents only the key section. The full data page is only visible after a search is initialized. Once the record is identified click the GO Button to fully display the page.

Banner 8



Banner 9



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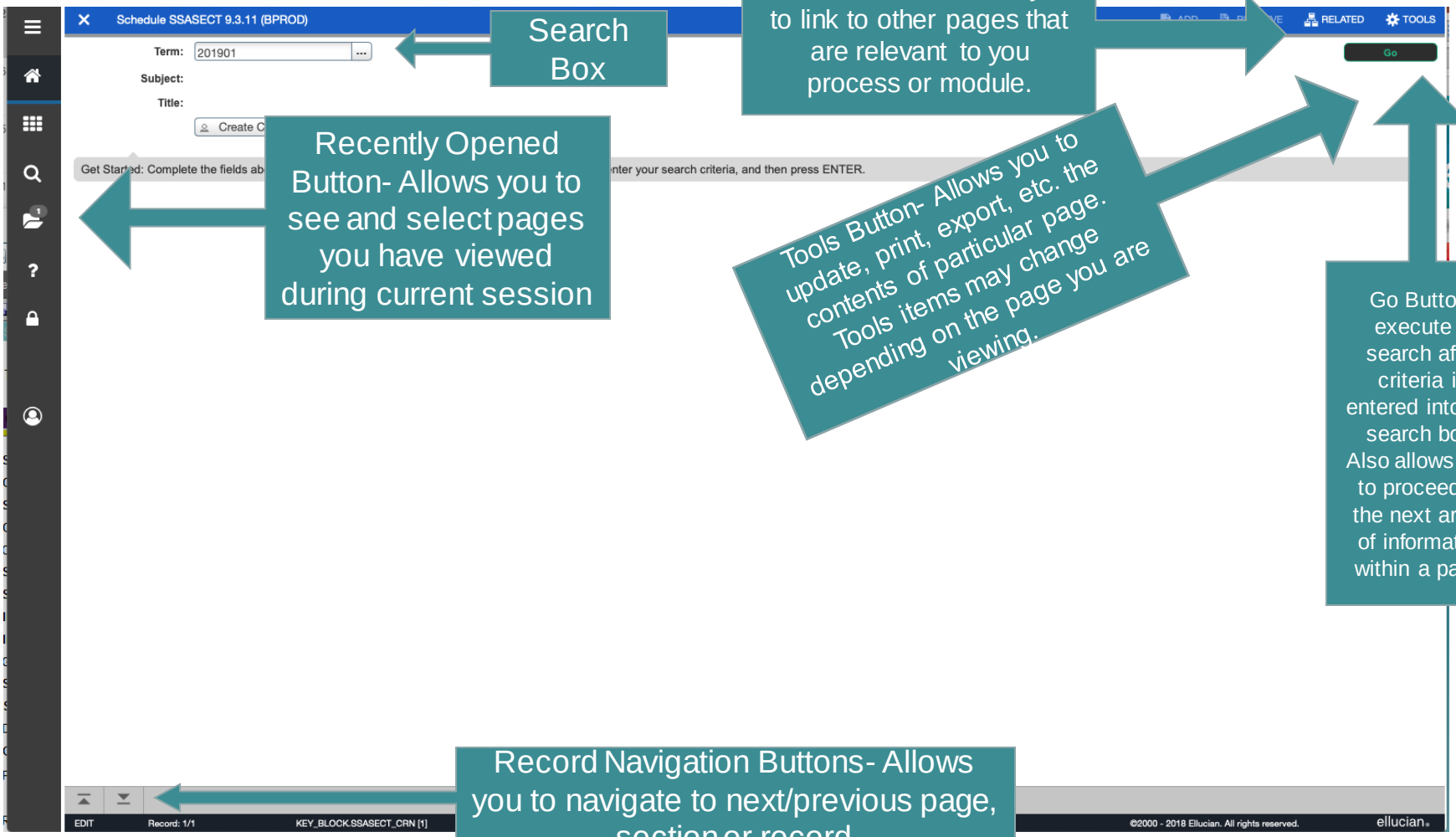
Parts of Banner Pages



Search Box

Related Button- Allow you to link to other pages that are relevant to you process or module.

Recently Opened Button- Allows you to see and select pages you have viewed during current session

Tools Button- Allows you to update, print, export, etc. the contents of particular page. Tools items may change depending on the page you are viewing.

Go Button- execute a search after criteria is entered into the search box. Also allows you to proceed to the next areas of information within a page.

Record Navigation Buttons- Allows you to navigate to next/previous page, section or record

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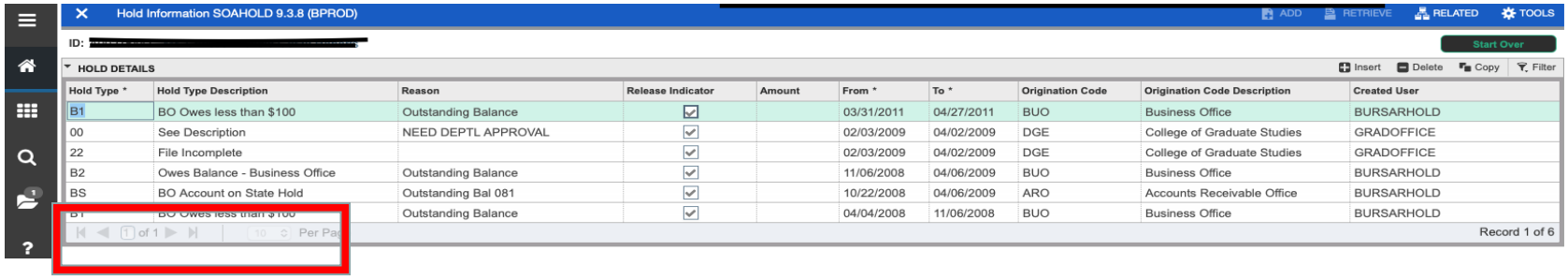
Page Navigation

- Admin pages that have multiple records associated within a. Page are identified by the **Page Navigation Buttons** located on the bottom left pf a page. The number of records associated with the page is displayed. Use the **Page Navigation Buttons** to move to display the record. Page down and Page up is also an option in moving between records within a page. The side scroll par is no longer an option..



SOAHOLD-Helpful Tips

- To immediately clear the hold- enter the current date: enter ‘T’ and press enter and it will enter the current date
- Hold information is created by a particular user and may only be deleted or changed by that user / user class.
- Hold type, from , and to are required fields

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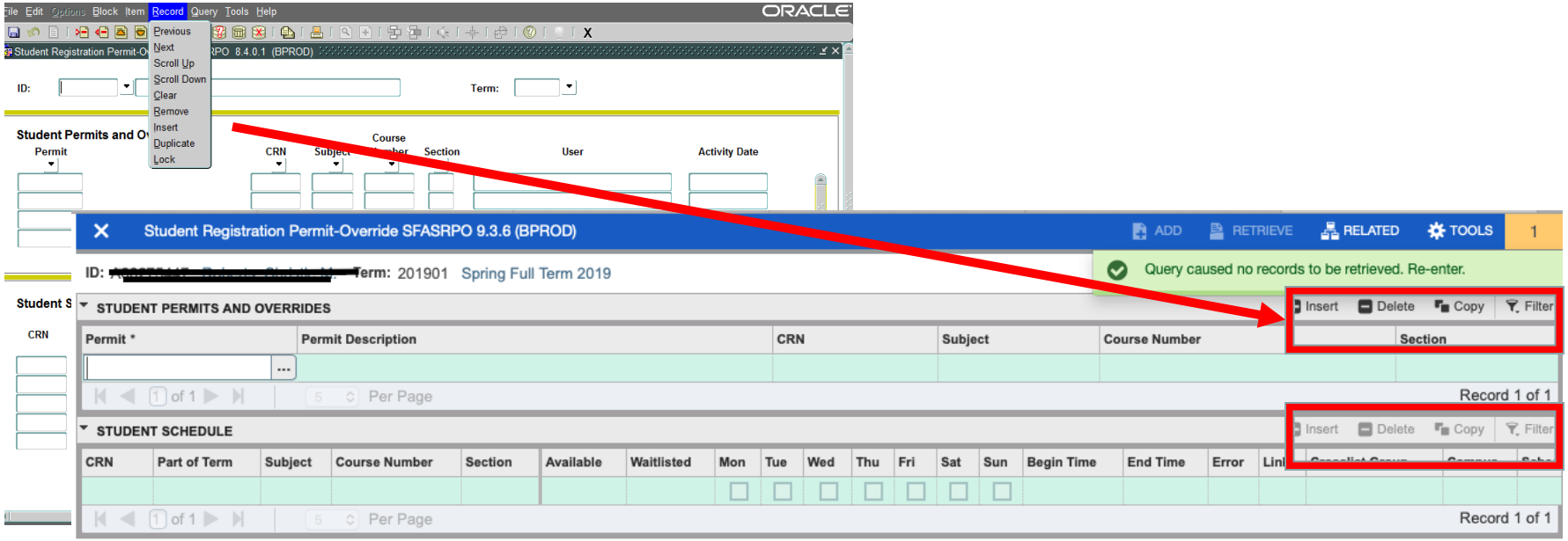
Page Updates and Changes to Sections

- Record maintenance within a page is executed using the action buttons of Insert Delete Copy and Filter. These items appeared on the Record Pull down menu in Banner 8. The action buttons also appear within sections of forms.



SFASPRO Helpful Tips

- To enter a permit, select 'insert'
- Each permit only serves one function. Students may need more than one permit before they enroll
- Data is displayed on a term-by-term basis
- Select the THREE DOTS to enter query mode to find correct permit.

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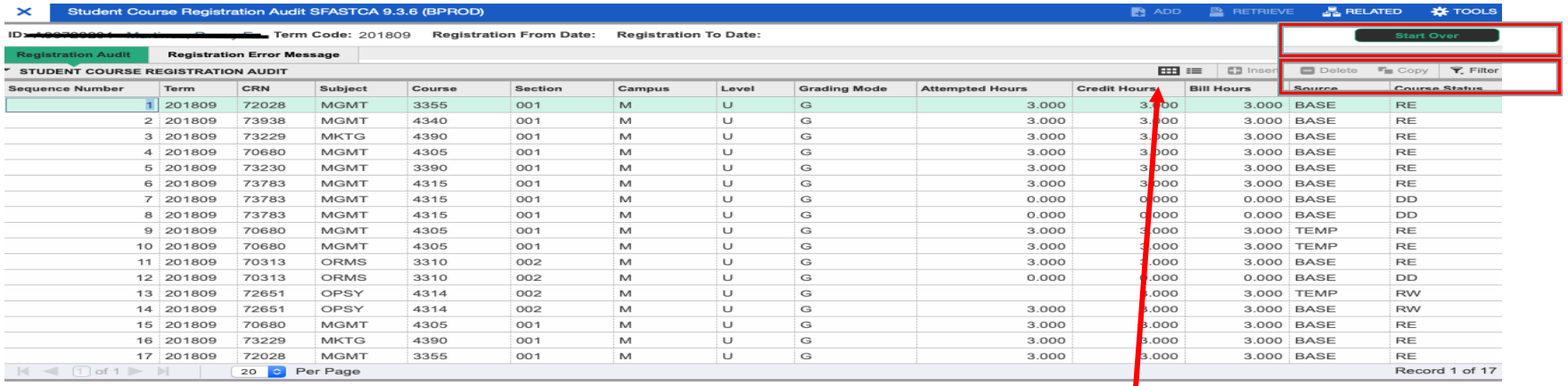
Start Over Button & Filter



SFASTCA Helpful Tips

- The date and user for the row you are on are now located at the bottom of the screen.
- Can switch between multiple and single record view by toggling these icons
- The filter option can be helpful to drill down to specific records to view.

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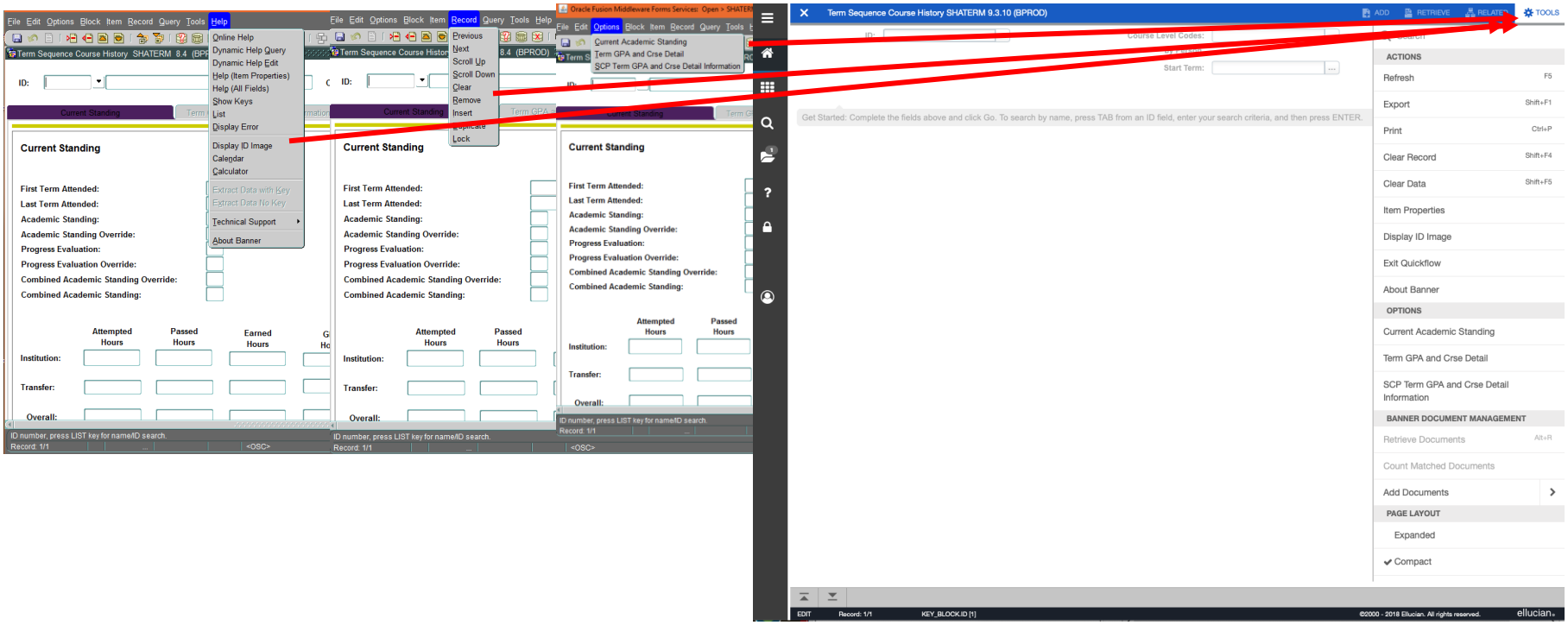
Key Admin Pages/Menu



- The Tools Button provides access to the familiar pull down menus of Options, Record and Help in Banner 8.

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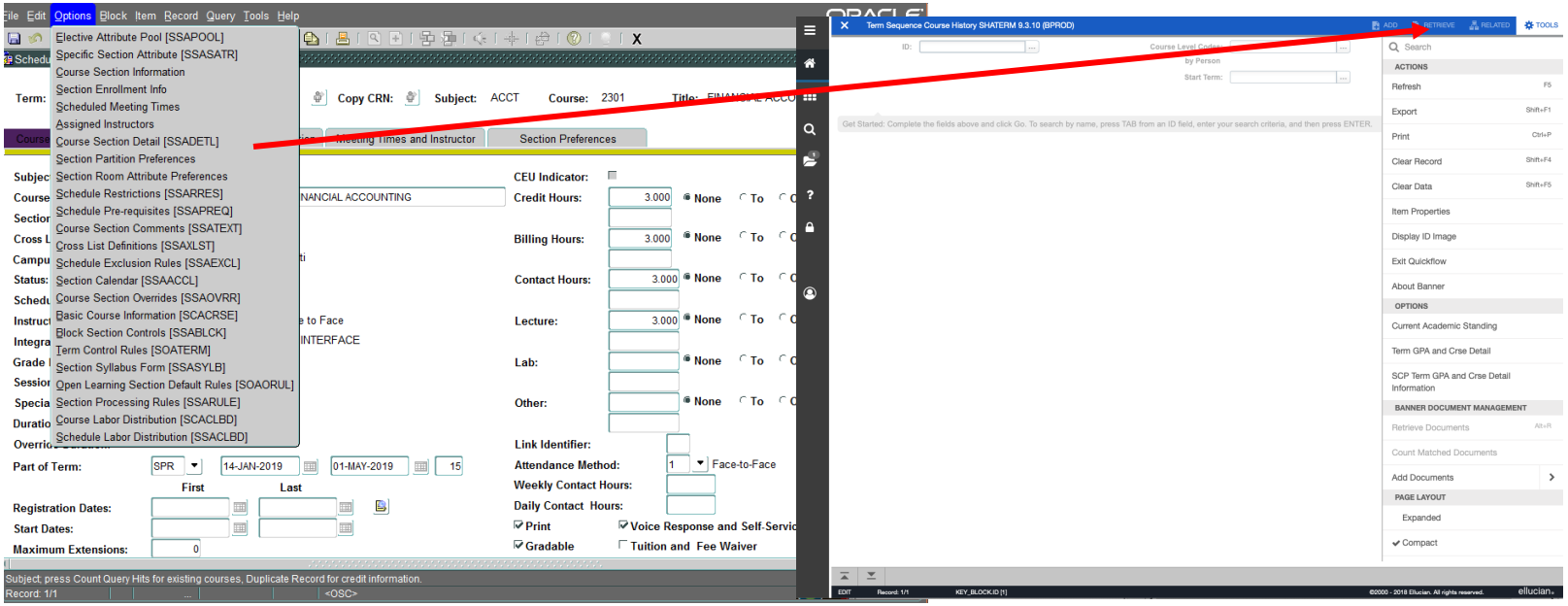
Admin Pages/Menus



- The related button allows you to link other pages that may be relevant to the page you are currently viewing.

SSASECT Helpful Tips

- Come to our course building training held in the SPRING! Be on the look out for date announcements!

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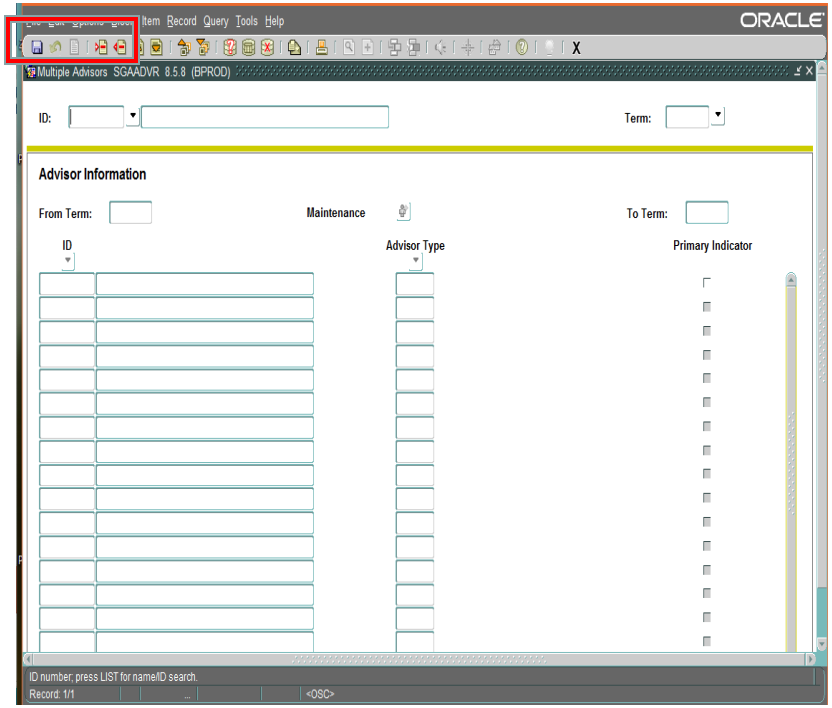
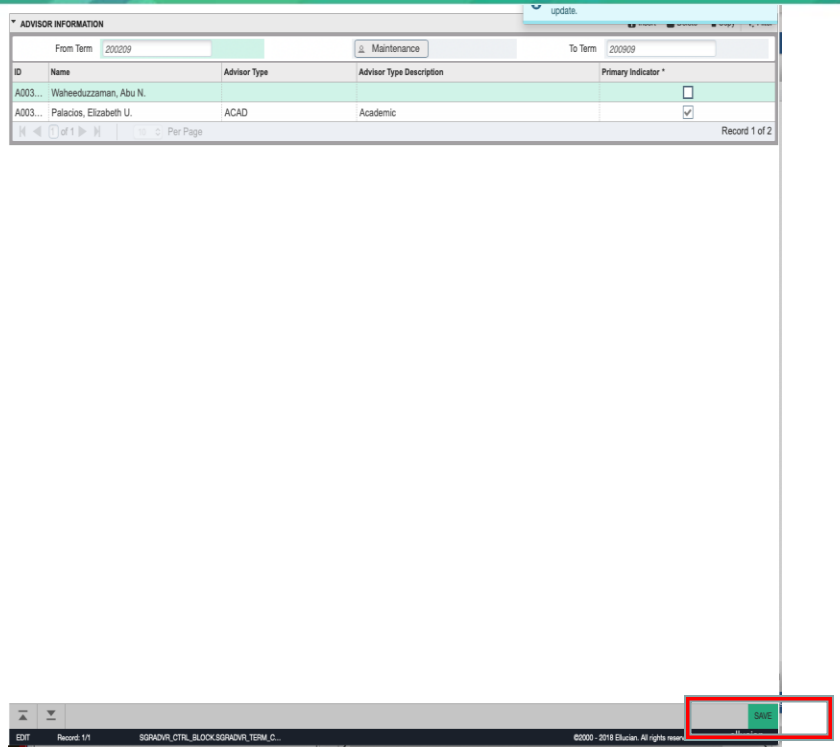
The SAVE Button





SGAADVR Helpful Tips

- Click the three dots to search student by name
- Make sure the “term” and “from term” match
  - If they do not match click on maintenance icon to open maintenance popup menu. Once open, select the Copy Advisor option

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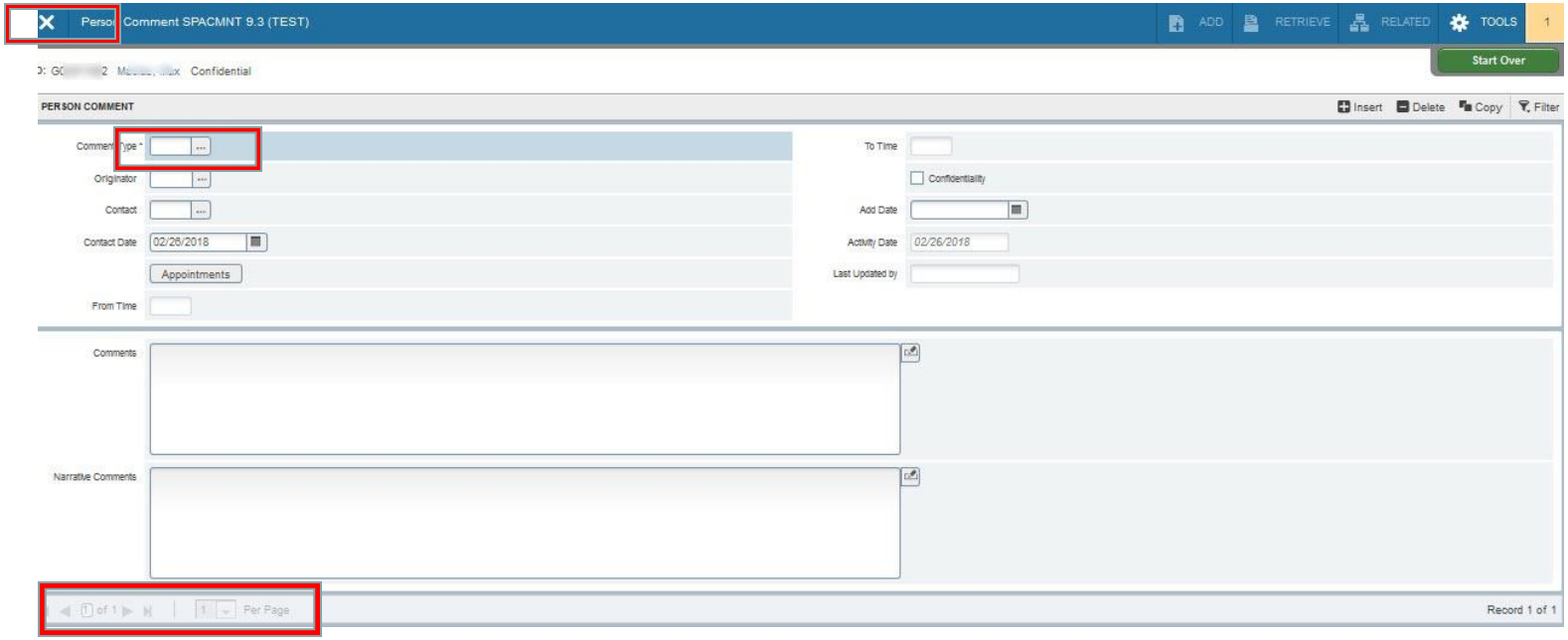
Additional Key Blocks



Helpful Tips

- The X button- clicking the X button in the upper left corner of a page will navigate back to the Home Screen. Button can also be utilized to cancel a filter/query within a page.
- If you don't know any of the variable, click the three dots to enter the query mode.
- If any comments exist for the person you have looked up, the most recently-created comment record will appear first. Use the scroll bar on the far right of your screen (or press the down arrow on your keyboard) to navigate to any additional comments that may exist.

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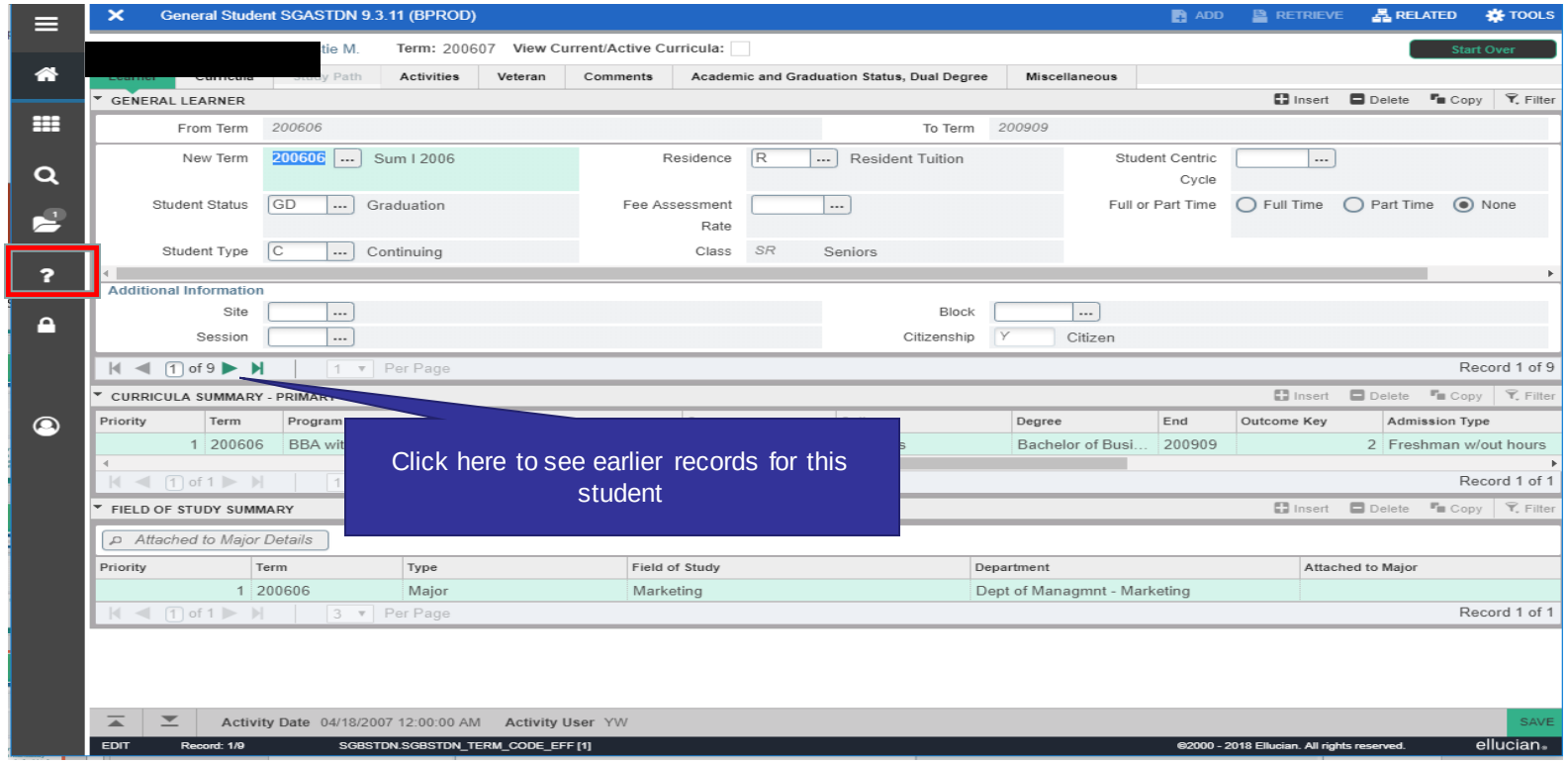
Admin Buttons continued…



Helpful Tips

- Helpful information is available for all pages. Click the question mark on the page to display the dialogue for the specific process.
- Use the “next page” button

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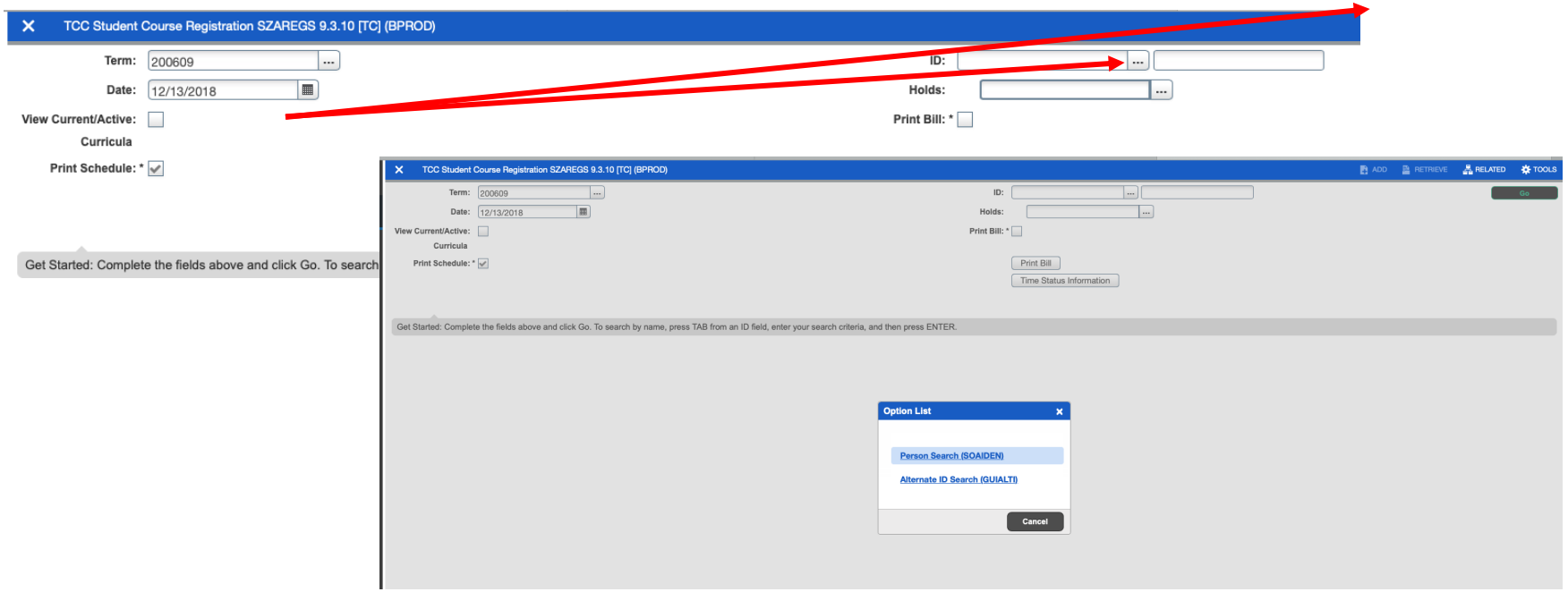
Searching



Helpful Tips

- The search and filter features of Banner has been modernized and expanded. Click on the ellipsis button to display the search option list.
- Select “person search” to enter query mode.

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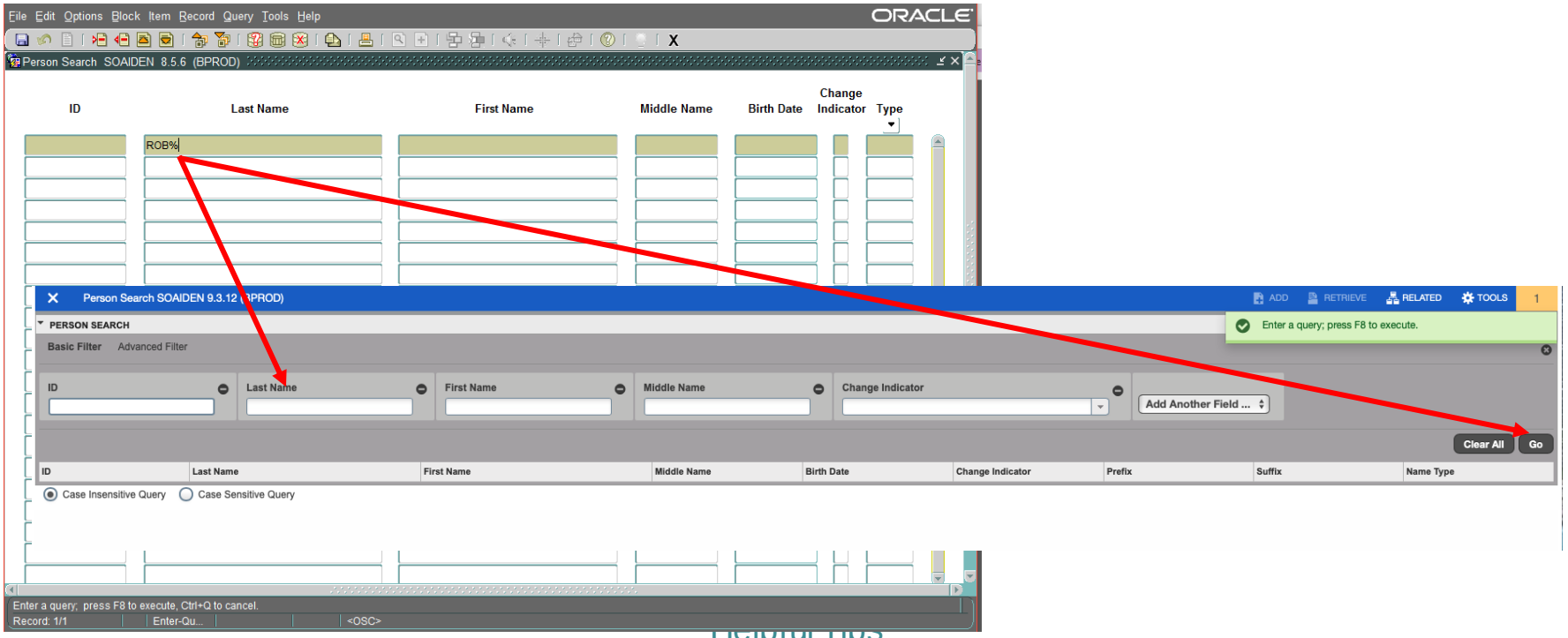
Query/Filtering



Helpful Tips

- Select the field options and parameter sets. To execute the query click the ”GO” button.

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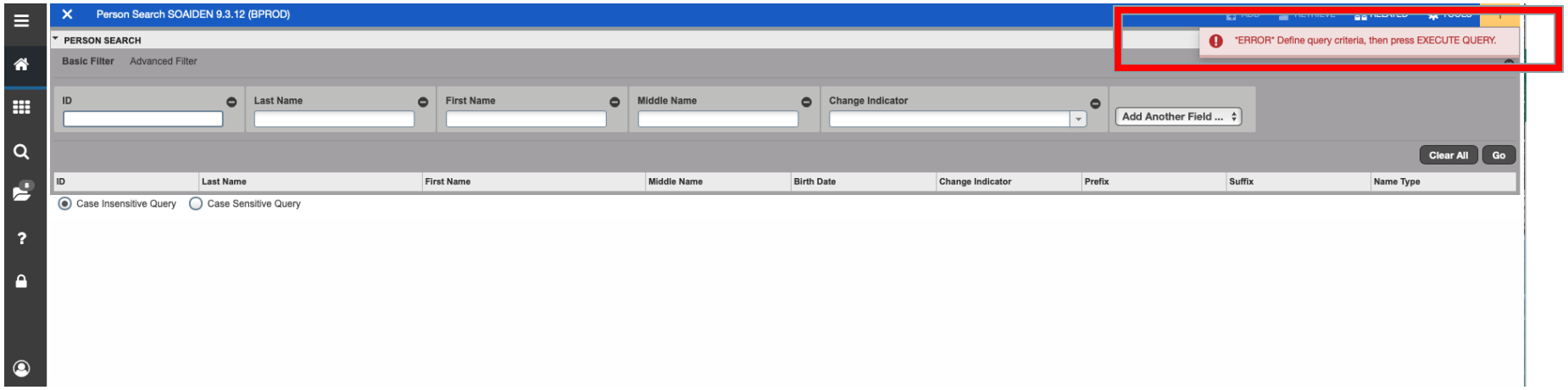
Message Notification Window



The Message notification window functions similar to the “Hint Line” in Banner 8. There are three types of messages displayed. Each message is color coded.

Success	**A green message pop-up box indicated a successful action/message**
Information	A blue message pup-up box is displayed for information message.
Warning	A yellow message pop-up box indicates a warning message.
Error	A red pop- up box indicates an error message.

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Admissions Forms

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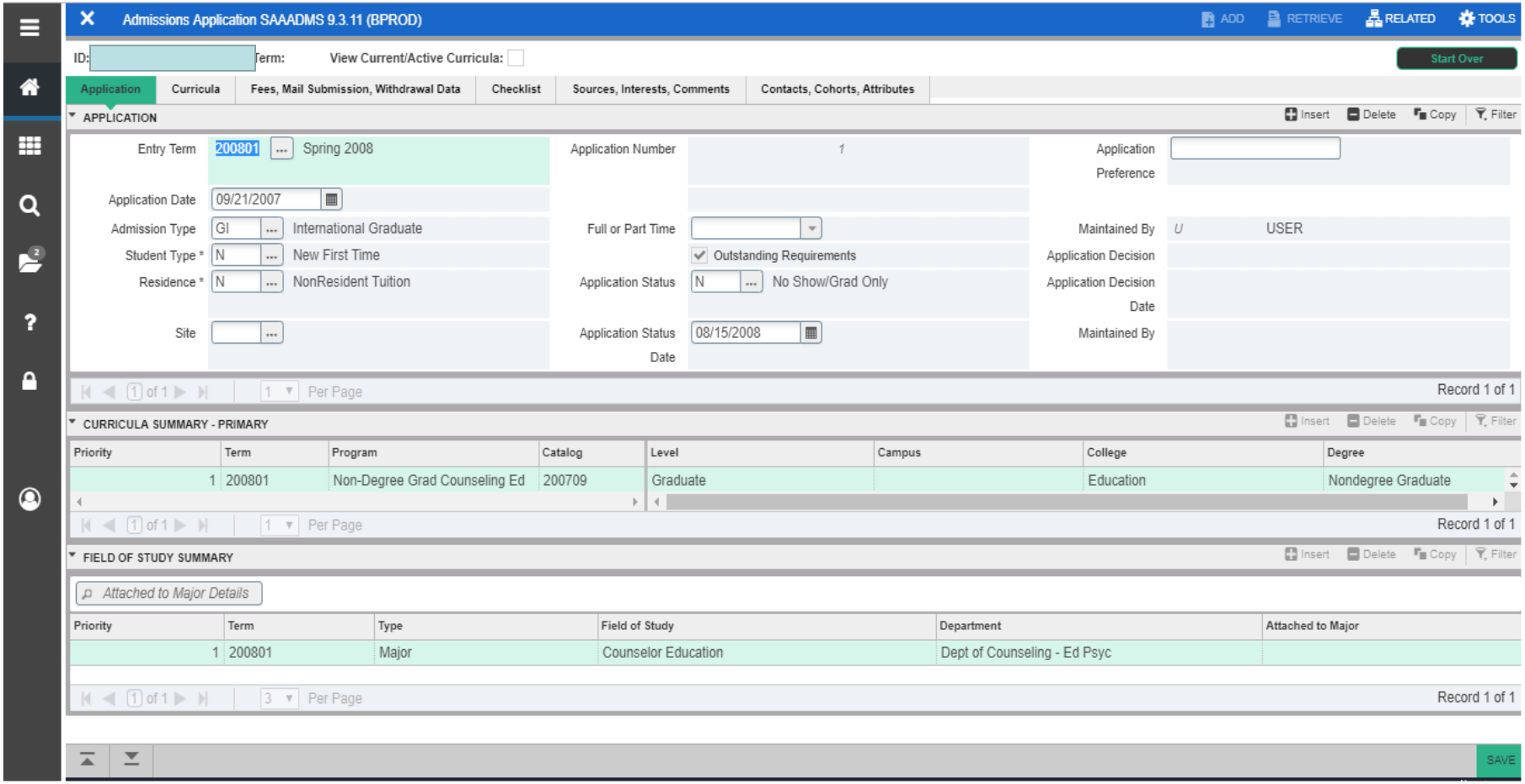
SAAADMS - APPLICATION



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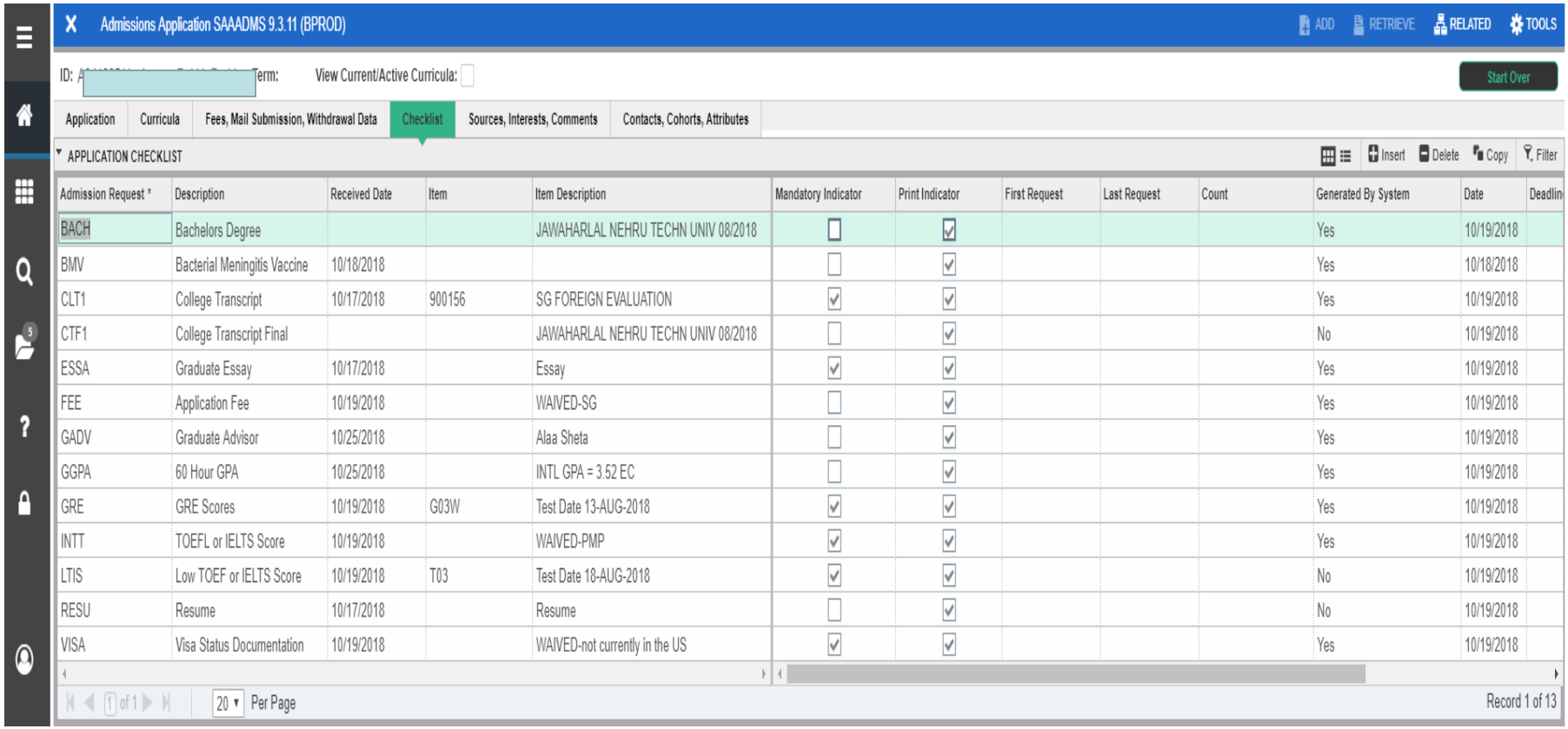
SAAADMS - CHECKLIST



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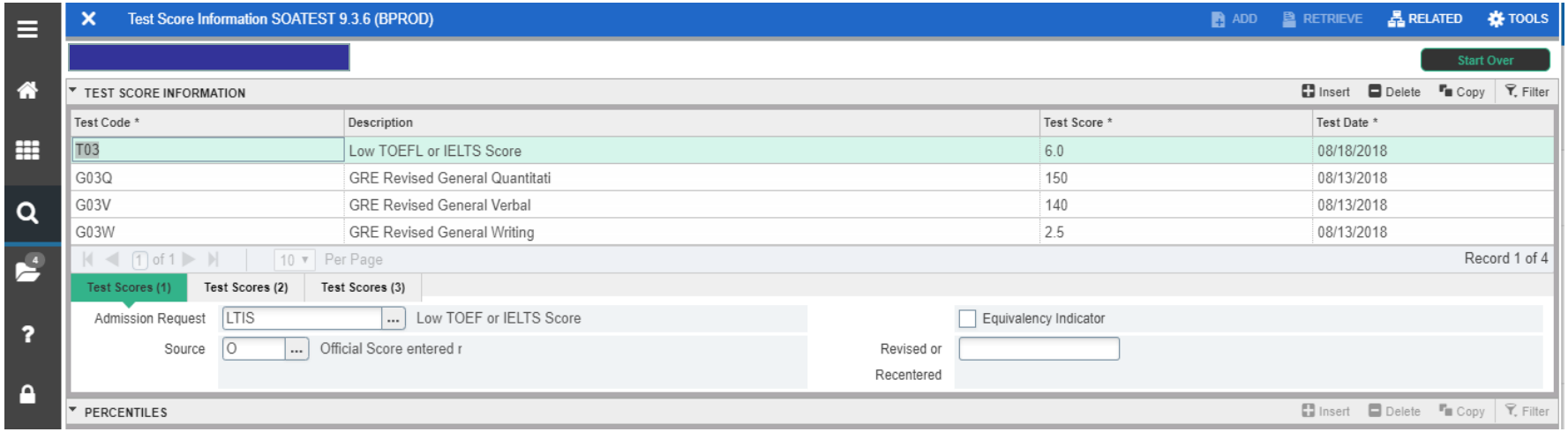
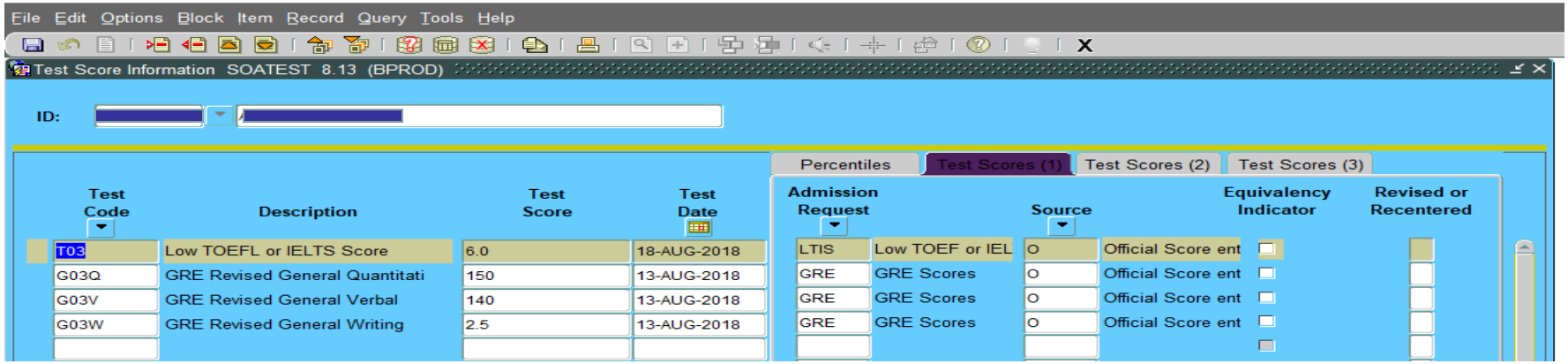
SOATEST





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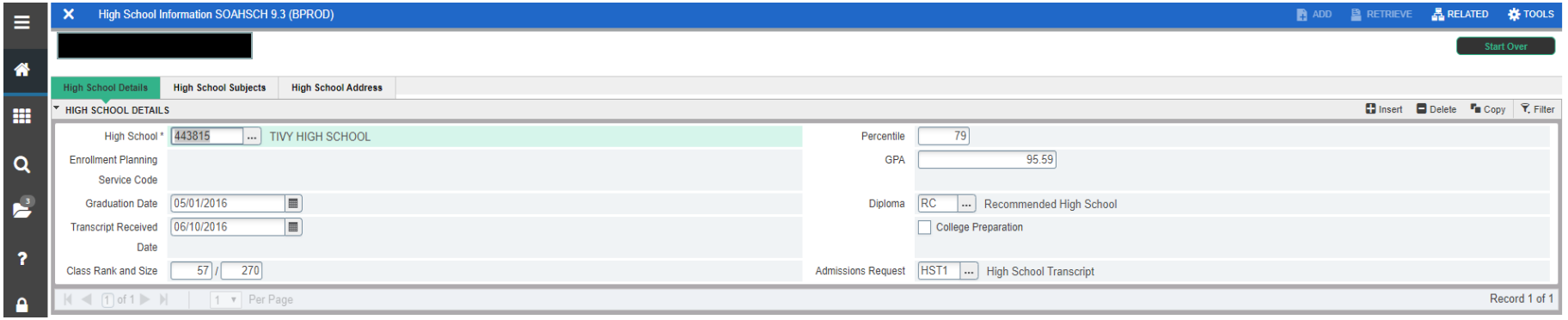
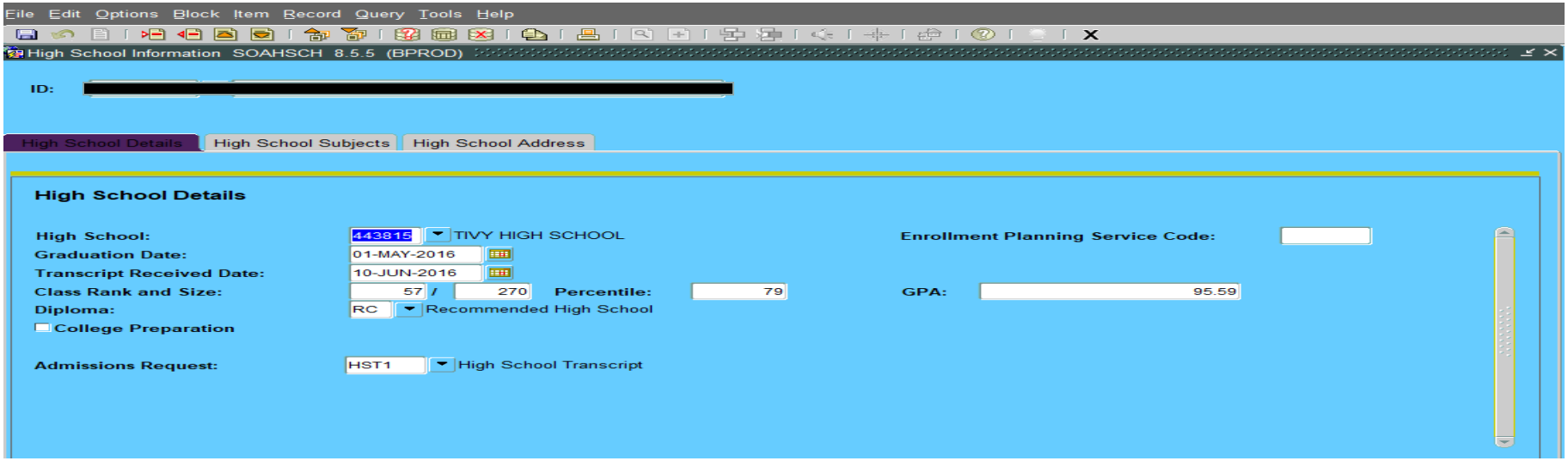
SOAHSCH – HS Details





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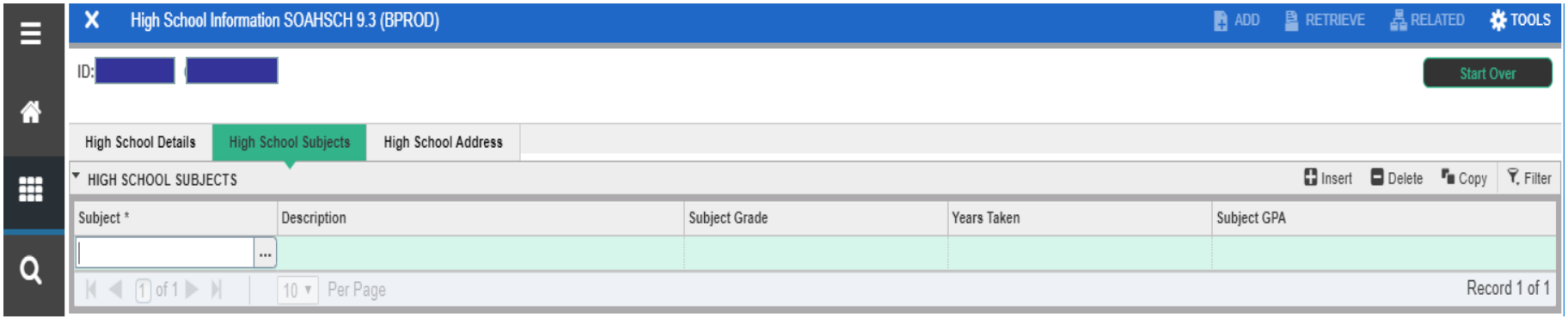
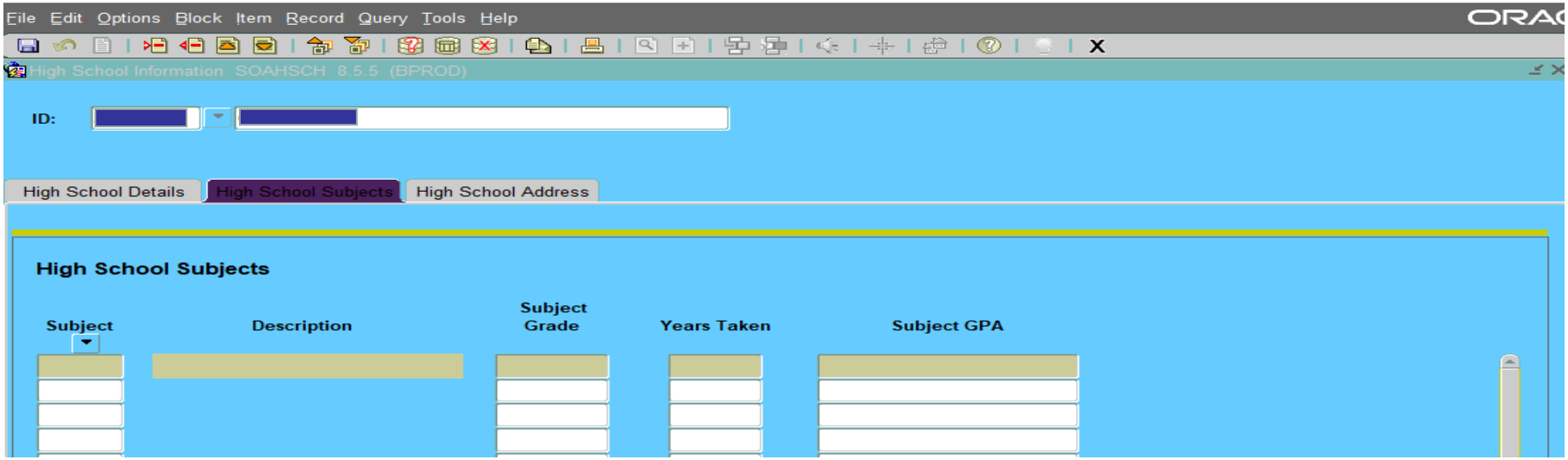
SOAHSCH – HS Subjects





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Training Resources & Support

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Further Training

Functional/Business Training:

- Financial Aid: Tracie Perez
- Registration & Scheduling: Christie Roberts
- Admissions:
  - Undergraduate level: Monica Martinez
  - Graduate level: Sandra Kureska
- Business Office/Bursar: Christina Holzheuser

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Questions & Support

https://bannerupgrade.tamucc.edu

- FAQs
- Navigation Guide
- Shortcut Keys

Email: itrequests@tamucc.edu

- login issues
- error messages

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