

Banner 9 Overview & Navigation

October 16 , 2018



Session Rules of Etiquette

- Please keep your cell phone in silent mode
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!

Agenda

- Introduction to Banner 9
- Application Navigator
- Basic Navigation
- Data Display Options
- Banner 8 In-House Forms / Reports
- Demo
- Helpful Tips
- Questions



Introduction to Banner 9

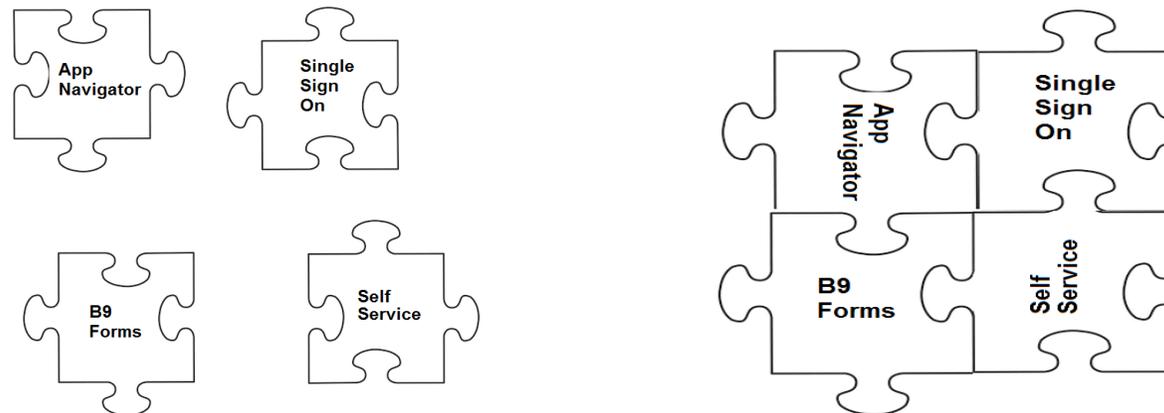


Introduction to Banner 9

- Banner 9 is a major upgrade to the Banner System. It will provide a better user experience , updated functionality and compatibility with mobile devices.
- “Banner 9 by Ellucian is no ordinary upgrade. It delivers a fresh user experience, all new tools, and significantly improved capabilities across Banner, driving new efficiencies so you can focus on student success.” - *ellucian*

The Banner 9 Puzzle

- New Architecture
- Extensive changes to the 'behind-the-scenes' components
- Significant Upgrade , Not just User Interface change
- New features and functionality
- This will be the biggest change in Banner since its installation in 2000



Benefits of the Upgrade

- Keeping up with current technology standards
- Browser based web application eliminating the need for a Java client on your workstations – *if not using Banner 8 in-house Modules/Reports*
- Seamless integration / Single Sign On
- Significant reduction in time and cost to maintain Banner
- Provides new functionalities
 - Communication Management
 - Faculty Attendance Tracking
- Provides new Enhanced UI
 - Faculty Grade Entry (Faculty members can also import grades directly from the spreadsheets)
 - Advising Student Profile (Consolidates a student's profile, education, and career path on a single view)
 - Employee, Faculty & Student Profile
 - Registration
 - Purchase Requisitions

When are we upgrading to Banner 9 ?

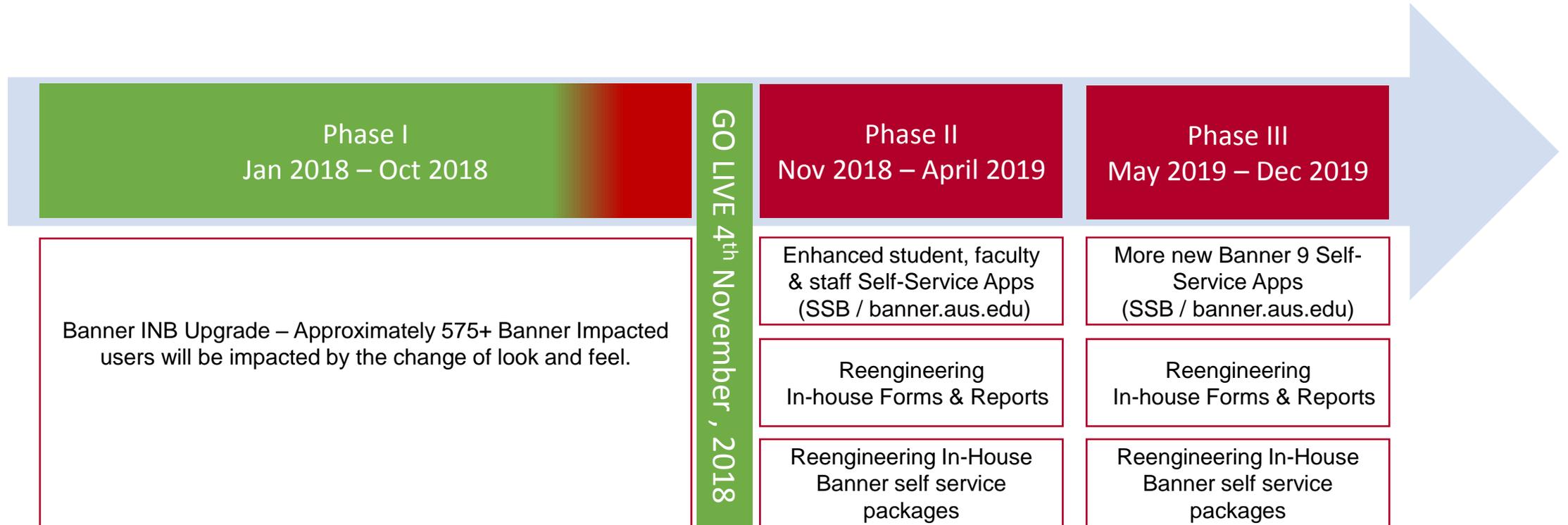
Banner 9 Go- live -Sunday, November 4 2018

- Banner 9 Admin URL address: <http://inb.aus.edu>
- Banner Self Service: <https://banner.aus.edu>

It's just the beginning

- The primary focus of the upgrade is getting all existing functionality and services operational in the new environment
- New functionality will have to be evaluated and prioritized

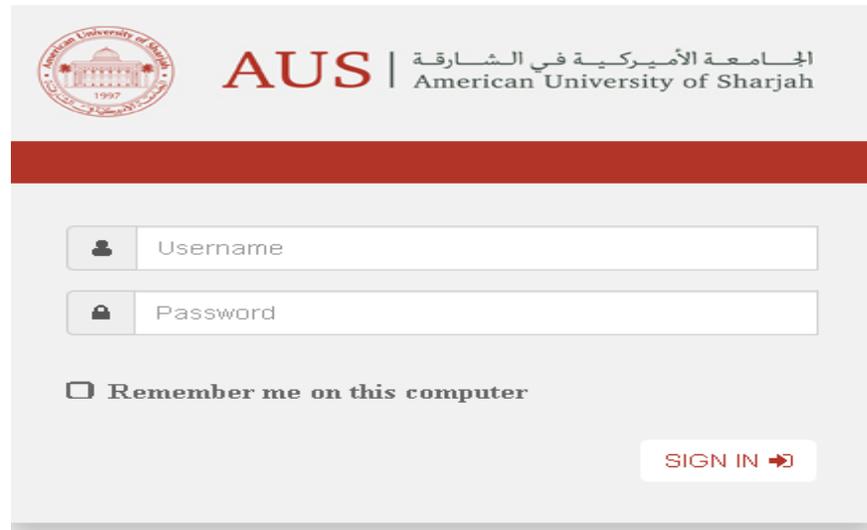
AUS Banner Upgrade Roadmap



Application Navigator

Access Banner 9 Test Environment (Data as of 17th April 2018)

- Open any web browser, preferably Firefox, Chrome or Internet Explorer *
** Internet Explorer must be chosen by users who need to run Banner 8 In-house modules/reports.*
- Type <http://banner9.aus.edu> in the URL address
- Login with your AUS username and password.
- Think wisely before you enable “Remember me on this computer”



The screenshot shows the login interface for the AUS Banner 9 Test Environment. At the top left is the AUS logo, which includes a circular emblem with a building and the year 1997. To the right of the logo is the text 'AUS | الجامعة الأميركية في الشارقة American University of Sharjah'. Below this is a red horizontal bar. The main login area contains two input fields: 'Username' with a person icon and 'Password' with a lock icon. Below these fields is a checkbox labeled 'Remember me on this computer'. At the bottom right of the login area is a button labeled 'SIGN IN' with a right-pointing arrow.

Banner INB Home

The screenshot displays the Banner INB Home interface. At the top, a blue header bar contains the text "General Menu GUAGMNU 8.6.4 (PROD) - Monday, October 08, 2018 - Last login Sunday, October 07, 2018 02:16:54 PM". Below this, there is a "Go To..." dropdown menu and a "Products:" dropdown menu. To the right, there are links for "Menu", "Site Map", and "Help Center".

The main content area is divided into two columns. The left column contains a tree view of folders under "My Banner", with "Banner" selected. The folders listed are: "Student [*STUDENT]", "Advancement [*ALUMNI]", "Finance System Menu [*FINANCE]", "Human Resources [*HRS]", "General [*GENERAL]", "Faculty Menu [*FACM]", "Public Relation Gener", "Point of Sale General", "UHC General Menu [*", and "Network General Men". The right column is a yellow box titled "My Links" containing three links: "Change Banner Password", "Check Banner Messages" (with a green checkmark), and "Banner Self Service (SSB)".

The background of the interface is a large image of a building with the text "THE AMERICAN UNIVERSITY OF SHARJAH" and "الجامعة الأميركية في الشارقة" visible. A "Welcome" message is overlaid on the image, along with a search bar. At the bottom right, there is a "Release: 3.0.0.2" and "Keyboard Shortcuts" link.

Application Navigator / Banner Home Screen

The screenshot shows the Banner Home Screen of the American University of Sharjah. The background is a photograph of the university's main building with the text 'THE AMERICAN UNIVERSITY OF SHARJAH' and 'الجامعة الأميركية في الشارقة' visible. The interface includes a 'Welcome' message, a search bar, and a vertical menu on the left. A red box highlights the menu items: Menu, Dashboard, Applications, Search, Recently Opened, Help, and Sign Out. A red box labeled 'Menu Bar' is positioned below the menu. A red box labeled 'Search Box' points to the search bar. An 'Important Note' box is located at the bottom of the screen.

Menu

Dashboard

Applications

Search

Recently Opened

Help

Sign Out

Menu Bar

Welcome

Search...

Search Box

Important Note:

- Always **Sign Out** when closing Banner – Don't just close your browser.
- Ensure not to allow browser to save your credentials.

Release: 3.0.0.2

 Keyboard Shortcuts

Basic Navigation



Banner 9 Key Terminology

Banner 8	Banner 9
Forms	Pages
Blocks	Sections
Next Block	Go Button (Moves you out of the Key block)
Query	Filters
Rollback	Start Over
Auto hint (messages at bottom left)	Notification Center (messages at top right)
Option Menu	Related Menu

Banner Keyboard Shortcuts

Action	Banner 8 Keystroke	Banner 9 Keystroke
First Page	Not applicable	Ctrl + Home
Last Page	Not applicable	Ctrl + End
Zoom in	Not applicable	Ctrl with +
Zoom out	Not applicable	Ctrl with -
Reset zoom to 100%	Not applicable	Ctrl 0 (Zero)
Previous Section	Ctrl + Page Up	Alt + Page Up
Next Section	Ctrl + Page Down	Alt + Page Down
Note : Existing key-strokes continue		

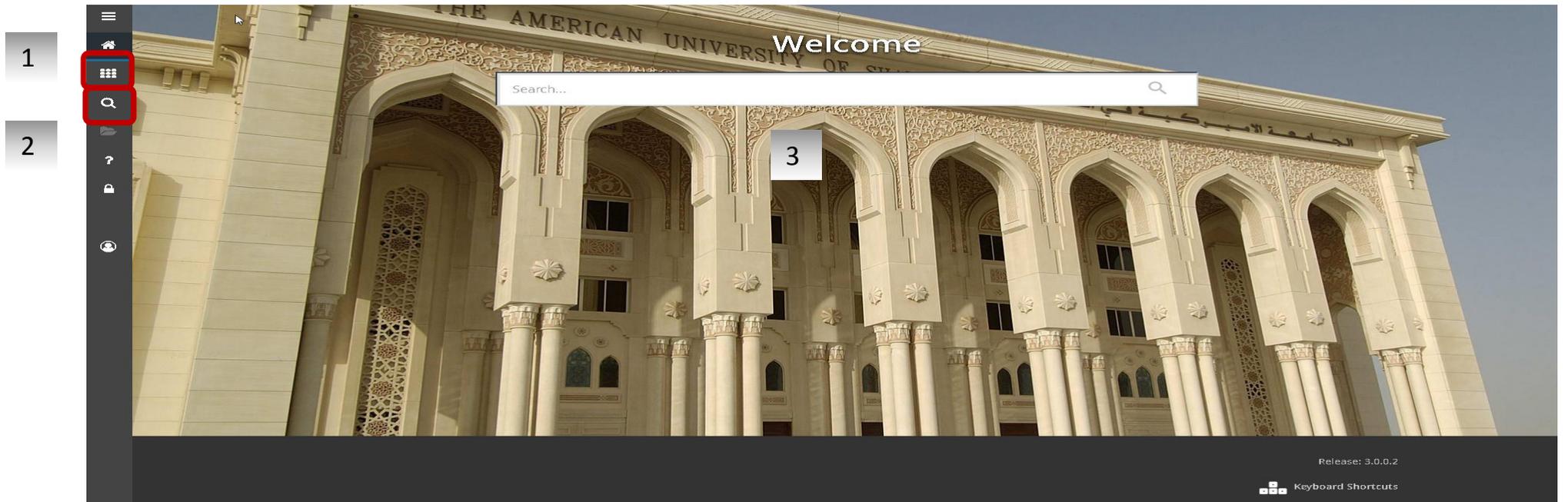
Page Navigation

- To access a page use any of the three navigation button.

1. **Applications Button** 

2. **Search Button** 

3. **Search Box**



Search

The search and filter of Banner 9 offers an auto-complete feature for navigating throughout Admin pages.

The screenshot displays the Banner 9 search interface. At the top, a search bar contains the text "Search...". Below it, a dropdown menu shows two search options: "General Person Identification (SPAIDEN)" and "General Person Identification (SPAIDEN)". A callout box labeled "Search Option" points to the search bar. Another callout box labeled "You can use the descriptive name of the page" points to the first search option. A third callout box labeled "or the Banner acronym of the page" points to the second search option. The background of the interface shows a building with the text "THE AMERICAN UNIVERSITY OF SHARJAH" and "Welcome".

Search...

Search Option

You can use the descriptive name of the page

general person

General Person Identification (SPAIDEN)

or the Banner acronym of the page

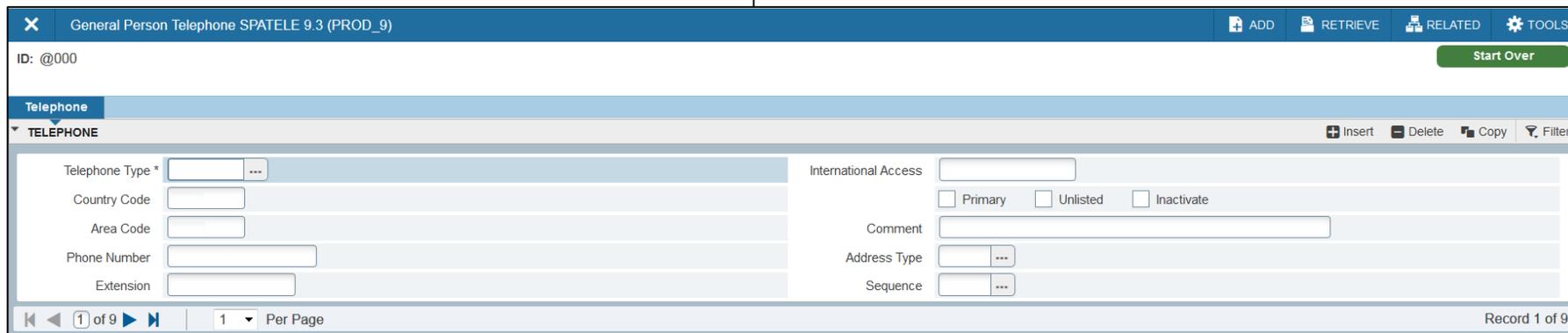
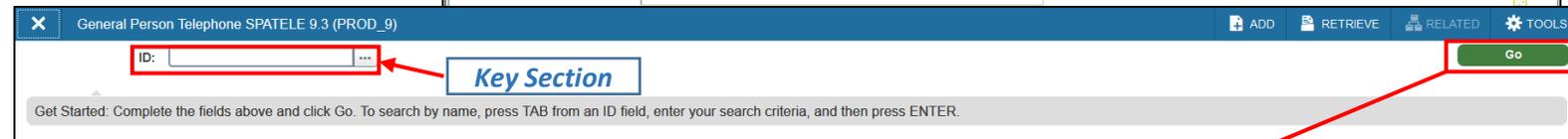
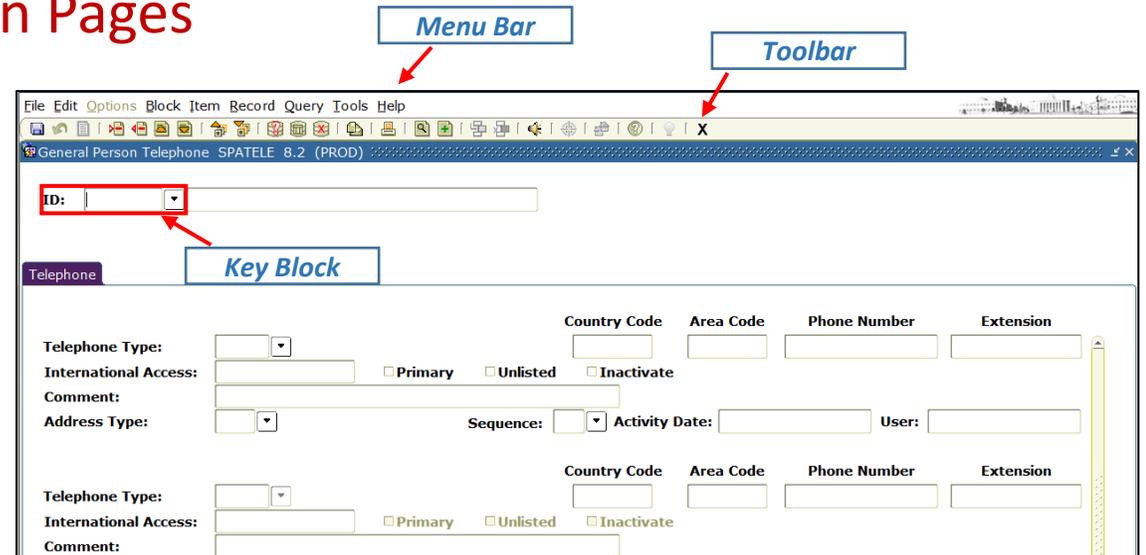
spai

General Person Identification (SPAIDEN)

Keyboard Shortcuts

Banner Admin Pages

- Banner 8 form displays many parts including: *menu bar, toolbar, and key block.*
- Banner 9 initial display presents only the **key section.**
- Once the record is identified, click **GO** Button to fully display the page



Parts of Banner 9 Page

Close Page

Add/ Retrieve:
Related to BDM

Related:
Link to other
relevant pages

Tools:
Update, Print,
Export....etc.

Roll back

Record
Maintenance:
Insert , Delete
, Copy & Filter

Previous Section

Next Section

Save

Page Layout - Compact and Expanded

The image displays two side-by-side screenshots of a web application interface for 'General Person Identification SPAIDEN 9.3.11 (PROD_9)'. The top screenshot shows the 'Compact' view, where the 'TOOLS' menu is highlighted with a red box and an arrow points to a 'PAGE LAYOUT' button. The bottom screenshot shows the 'Expanded' view, where the form is more detailed, including fields for 'Prefix', 'Suffix', 'Preferred First Name', and 'Full Legal Name'. A 'Start Over' button is visible in the top right of the expanded view. The interface includes a navigation sidebar on the left and a status bar at the bottom.

Data Display Options

Fields with a asterisk (*) are Required

Term Code Validation STVTERM 9.3.6 (PROD_9)

ADD RETRIEVE RELATED TOOLS

TERM CODE VALIDATION

Active filters: Academic Year: 2019 Clear All Filter Again

Term *	Term Description *	Term Start Date *	Term End Date *	Term Type	Academic Year *	Housing Start Date *	Housing End Date *	Financial Aid Process Year	Summer
201940	Summer II 2019	28/07/2019	29/08/2019	M	2019	28/07/2019	30/08/2019	2019	<input checked="" type="checkbox"/>
201930	Summer 2019	11/06/2019	24/07/2019	M	2019	10/06/2019	27/07/2019	2019	<input checked="" type="checkbox"/>
201920	Spring 2019	27/01/2019	22/05/2019	S	2019	17/01/2019	25/05/2019	2019	<input type="checkbox"/>
201910	Fall 2018-2019	02/09/2018	20/12/2018	T	2019	22/08/2018	24/12/2018	2019	<input type="checkbox"/>

Term * Term Description * Term Start Date * Term End Date *

Sort Order

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.

Term Code Validation STVTERM 9.3.6 (PROD_9)

ADD RETRIEVE RELATED TOOLS

TERM CODE VALIDATION

Active filters: Academic Year: 2019 Clear All Filter Again

Term *	Term Description *	Term Start Date *	Term End Date *	Term Type	Academic Year *	Housing Start Date *	Housing End Date *	Financial Aid Process Year	Summer
201940	Summer II 2019	28/07/2019	29/08/2019	M	2019	28/07/2019	30/08/2019	2019	<input checked="" type="checkbox"/>
201930	Summer 2019	11/06/2019	24/07/2019	M	2019	10/06/2019	27/07/2019	2019	<input checked="" type="checkbox"/>
201920	Spring 2019	27/01/2019	22/05/2019	S	2019	17/01/2019	25/05/2019	2019	<input type="checkbox"/>
201910	Fall 2018-2019	02/09/2018	20/12/2018	T	2019	23/08/2018	24/12/2018	2019	<input type="checkbox"/>

1 of 1 Per Page Record 1 of 4

Term *	Term Description *	Term Start Date *	Term End Date *
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Message Notification Window

Click to Close Notification

Term Code Validation STVTERM 9.3.6 (PROD_9)

ADD RETRIEVE RELATED TOOLS 1

TERM CODE VALIDATION

✓ Saved successfully (1 rows saved)

You may see four message notification component types when working with Banner 9:

Error Notification – Will display a “!” in a circle when message is displayed.

Information Notification – Will display an “i” in a circle when message is displayed. May display an OK button that you must select to continue.

Success Notification – Will display a checkmark in a circle when message is displayed.

Warning Notification – Will display a “!” in a yield sign when message is displayed. Will also display buttons, Yes/No/Cancel, that must be selected to continue.

Term	Term Description	Term Start Date	Term End Date	Term Type	Academic Year	Posting Start Date	Posting	Financial Aid Process Year	Summer
9999		15/05/2999						9999	<input type="checkbox"/>
2019		28/07/2019	30/08/2019					2019	<input checked="" type="checkbox"/>
201930	Summer 2019	02/09/2018	20/12/2018	T	2019	27/07/2019		2019	<input checked="" type="checkbox"/>
201920	Spring 2019	17/01/2019	25/05/2019		2019			2019	<input type="checkbox"/>
201910	Fall 2018-2019	23/08/2018	24/12/2018		2019			2019	<input type="checkbox"/>
2018		28/07/2018	29/08/2018		2018			2018	<input type="checkbox"/>
201830	Summer 2018	29/05/2018	17/07/2018	M	2018	26/05/2018		2018	<input type="checkbox"/>
201820	Spring 2018	21/01/2018	15/05/2018	S	2018	11/01/2018		2018	<input type="checkbox"/>
201810	Fall 2017	17/08/2017	24/12/2017		2018			2018	<input type="checkbox"/>
201740	Summer II 2017	23/07/2017	24/08/2017		2017			2017	<input type="checkbox"/>
201730	Summer 2017	27/05/2017	21/07/2017	M	2017	27/05/2017		2017	<input type="checkbox"/>
201720	Spring 2017	21/01/2017	21/05/2017		2017			2017	<input type="checkbox"/>
201710	Fall 2016	18/08/2016	24/12/2016		2017			2017	<input type="checkbox"/>
201640	Summer II 2016	24/07/2016	27/08/2016		2016			2016	<input type="checkbox"/>
201630	Summer 2016	05/06/2016	23/07/2016	M	2016	03/06/2016		2016	<input type="checkbox"/>
201620	Spring 2016	27/08/2015	20/01/2016	S	2016	27/08/2015		2016	<input type="checkbox"/>
201610	Fall 2015	01/08/2015	04/09/2015		2016			2016	<input type="checkbox"/>
201530	Summer 2015	19/06/2015	03/08/2015		2015			2015	<input type="checkbox"/>
201520	Spring 2015	05/02/2015	12/06/2015	M	2015			2014	<input type="checkbox"/>

1 of 7

Yes No Cancel

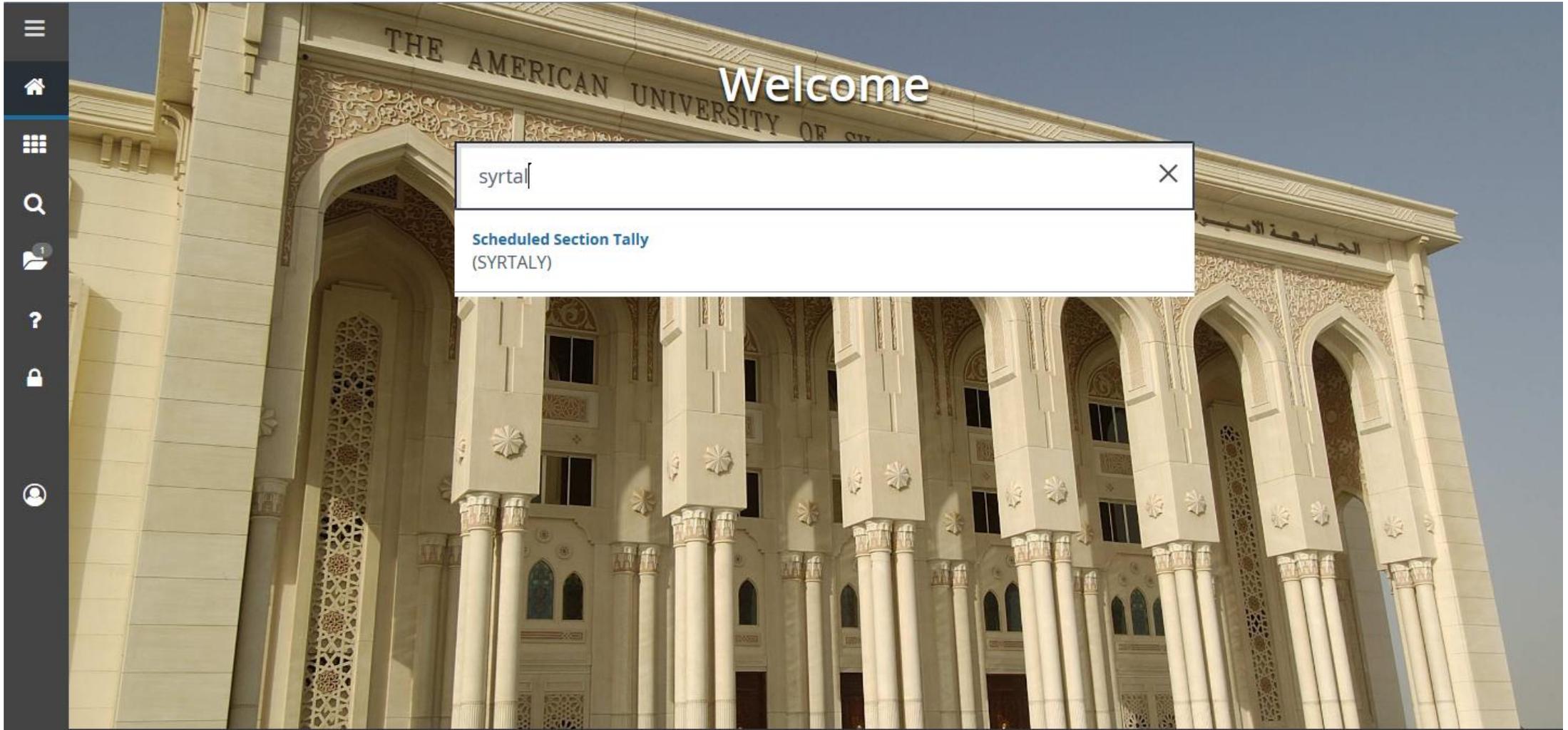
Record 3 of 135

Filter

- Filtering tips:
 - Filters are case sensitive
 - Multiple fields can be selected to narrow results
 - Select the appropriate operator from the drop down
 - % can be used as a wildcard in the Basic Filter and in the Advanced Filter when using the qualifiers of **Like**, **Starts With**, or **Ends With**.

Banner 8 In-House Forms / Reports

Access Banner 8 In-House Forms / Reports



Access Banner 8 In-House Forms / Reports

Application Navigator

Banner Home Screen

The screenshot displays the Banner 8 application window titled "Scheduled Section Tally SYRTALY 8.0 (PROD_9)". The interface includes a menu bar (File, Edit, Options, Block, Item, Record, Query, Tools, Help) and a toolbar with various icons. The main content area features a "Select Report:" dropdown menu set to "Scheduled Section Tally". Below this is a form with the following fields:

Term Code:	201930	Summer 2019
Level Code:	ALL	All Levels
College Code:	ALL	All Colleges
Department Code:	ALL	All Departments
Division Code:	ALL	All Divisions
Section Type:	ALL	All Section Types
Subj/CRSE Number*:	ALL	
Enrollment <=:	999	
Section Status:	A	Active
Generate to File:	No	

At the bottom of the form, there are two dropdown menus: "Printing Method:" set to "Screen" and "Report Format:" set to "PDF". A note below the form reads: "* Select Subject/CRSE Number in this format: ACC201,BIS101, ... or ALL".

The footer of the application window contains the AUS logo and name in Arabic and English, the text "Administrative Services", and a status bar with the text "Term Code; press LIST for valid codes" and "Record: 1/1".

My Banner Personal Menu

You may create a personal menu tied to your Banner user ID using GUAPMNU Page.

You will have to sign out and sign back in to see changes on your My Banner.

My Banner Maintenance GUAPMNU 9.0 (PROD_9)

MENU MAINTENANCE

Type * Oracle Forms module

Object *	Description *
SYSTNTR	'DD' / 'DW' Registration Status
TSA1098	1098-T Tax Information
FTMITYP	1099 Income Type Code Maintenan
FAA1099	
FOA1099	
FYL8020	
STVSOFF	
STVGSTA	
STVTASK	
STVGTYP	
SYAACIN	

Object	Description
SPAIDEN	General Person Identification
GOAEMAL	E-mail Address
SGASTDN	General Student

Mobile Menu:

- Back to Applications
- My Banner
 - General Person Identification (SPAIDEN)
 - E-mail Address (GOAEMAL)
 - General Student (SGASTDN)

Thank you

- Information Technology
- Office of the Registrar
- Human Resources
- Finance
- Office of Enrollment Management
- Supply Chain
- Student Residential Life

Hands-On Training Sessions

Finance Requisition
Omaia Mahmood / Arwa Al-Alami

Session	Date	Time
Banner 9 Admin Pages – Requisitions	Sunday October 21, 2018	11:00 am – 1:00 pm
Banner 9 Admin Pages – Requisitions	Sunday October 21, 2018	2:00 pm – 4:00 pm
Banner 9 Admin Pages – Requisitions	Thursday October 25, 2018	11:00 am – 1:00 pm
Banner 9 Admin Pages – Requisitions	Thursday October 25, 2018	2:00 pm – 4:00 pm

General Navigation
Arwa Al-Alami

Session	Date	Time
Banner 9 Overview & Navigation	Monday October 22, 2018	10:00 am – 11:00 am
Banner 9 Overview & Navigation	Tuesday October 23, 2018	11:00 am – 12:00 pm
Banner 9 Overview & Navigation	Wednesday October 24, 2018	11:00 am – 12:00 pm

Faculty & Advisor
Amal Al-Muzaini /Arwa Al-Alami

Session	Date	Time
Banner 9 Overview & Navigation – Faculty & Advisor	Monday October 22, 2018	3:00 pm – 4:00 pm
Banner 9 Overview & Navigation – Faculty & Advisor	Tuesday October 23, 2018	3:00 pm – 4:00 pm
Banner 9 Overview & Navigation – Faculty & Advisor	Wednesday October 24, 2018	3:00 pm – 4:00 pm

Helpful Tips

- FAQ Link: <https://itfaq.aus.edu/faq/banner9>
FAQ will continue to be updated over time
- Please refer to FAQ Banner Transformed - Getting Started with Administrative Applications to assist you with the new look and feel.
- [Ellucian Banner 9 Quick Tour](#). Note: This is a generic quick tour video, some items mentioned in the video may be different at AUS

IT Support

- If you have specific questions concerning Banner upgrade , please send email to banner9@aus.edu
- If you experience any problems please contact the IT Service Desk: 06 515 2121 or email to ITServiceDesk@aus.edu

Thank You
Questions

