



**AUS** | الجامعة الأميركية في الشارقة  
American University of Sharjah

**IT Department**  
قسم تكنولوجيا المعلومات

Banner Administrative Pages  
Navigation and Basic User Guide  
November 2018

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## Introduction to Ellucian Banner 9

This guide will introduce learner to the basic functions of Banner Administrative Pages, including navigation, searching, record filtering, and record updates.

Banner 9 is the latest version of Ellucian Banner System designed for higher education.

Banner 9 is a web-based application providing new look and feel interface, new functionalities, enhanced features and is compatibility with mobile devices.

Below are some highlights of new and enhanced features:

- Single sign-on: access multiple systems with a single login, without repeated requests for login
- Enhanced navigation through *Application Navigator* for a seamless experience
- New administrative pages and reports
  - Communication Management
  - Faculty Grade Entry (*import grades from existing spreadsheets*)
  - Advising Student Profile (*Consolidates a student's profile, education, and career path on a single page*)
  - Employee and Faculty Profile
- Eliminate users' browsers compatibility problems
  - Works on all current browsers, such as: Chrome, Firefox, Safari, MS Edge

## Banner 9 Key Terminology

Below are some new definitions for Banner 9 that is different from Banner 8:

Banner 8	Banner 9
Forms	Admin Pages or Pages
Blocks	Sections
Next Block	Go Button
Query	Filters
Rollback	Start Over
Options Menu	Related Menu
Auto hint (messages at bottom left)	Notification Center (messages at top right)

## What Has Changed

- Search Features
  - The ability to find a page by its description
  - Auto complete feature provides a list of items that matches what you are typing
- Advanced Filter using language parameters
- Multiple Record Views
- Collapse of Sections within a Page
- Some keyboard shortcuts
  - *Banner runs in a web browser, some keyboard shortcuts had to be changed while others no longer work*
  - Visit <https://itfaq.aus.edu/faq/284> for a list of all Banner 9 Keyboard Shortcuts

## What Has Not Changed

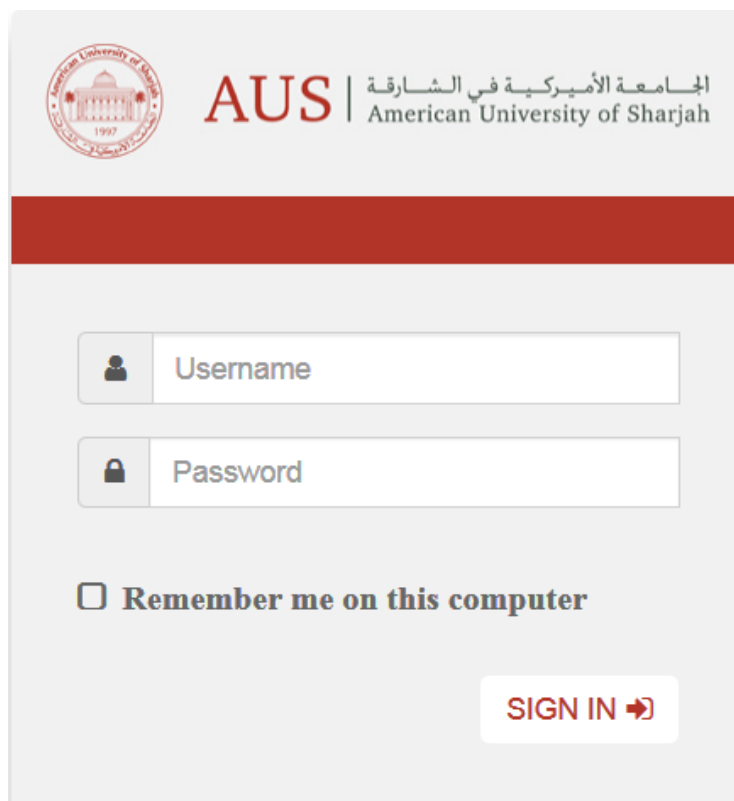
- Banner URL address: <http://inb.aus.edu>
- Banner Self Service: <http://banner.aus.edu>
- My Banner personalized menu
- Users' security access to forms
- Naming conventions
  - SPAIDEN, SOAHOLD, etc.
- Data elements
- Tabbed folders within pages

## Accessing Banner Application

Banner 9 is accessible through any web browser using the same URL that of Banner8.

### Steps to Login

- Open any browser, preferably: Firefox and Chrome or Internet Explorer (*for users who need to run in –house modules/reports*)
- In the URL, Type: <http://inb.aus.edu>
- Login with your **AUS** username and password. If Banner does not accept your credentials, contact your supervisor.
- Think wisely, before you tick “Remember me on this computer”
- Click **SIGN IN**

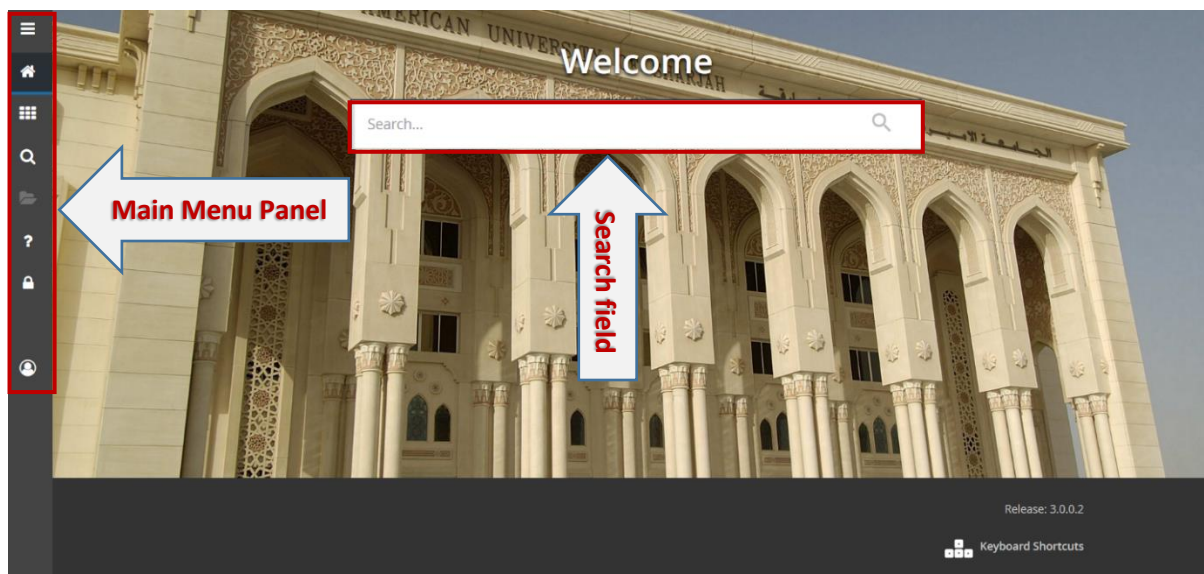


The screenshot shows the login interface for the American University of Sharjah (AUS). At the top left is the university's circular seal. To its right is the text 'AUS' in large red letters, followed by the university's name in Arabic 'الجامعة الأميركية في الشارقة' and English 'American University of Sharjah'. Below this is a thick red horizontal bar. The login form consists of 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 is a white button with the text 'SIGN IN' and a red right-pointing arrow.

## Application Navigator









Application Navigator is a new tool on Banner 9 home page that offers seamless navigation between Banner 9 pages and Banner 8 forms, without needing to remember if a form has been converted.

Below is a sample of a Home Page.



## Main Menu Panel

Main Menu Panel is located along left side of the Home page and it is always present all the time. It contains:

	<ul style="list-style-type: none"><li>• <b>Menu icon</b> is a toggle switch, when clicked it displays the name of the main menu panel and when clicked again it closes the menu. It includes:</li></ul>
	<ul style="list-style-type: none"><li>○ <b>Dashboard icon:</b> used to return to landing page from any where in the system</li></ul>
	<ul style="list-style-type: none"><li>○ <b>Applications icon:</b> used to display Banner, My Bnner, and Banner SS menu</li></ul>
	<ul style="list-style-type: none"><li>○ <b>Search Option:</b> used to find pages and forms</li></ul>
	<ul style="list-style-type: none"><li>○ <b>Recently Opened:</b> displays a list of recently opened pages and forms</li></ul>
	<ul style="list-style-type: none"><li>○ <b>Help:</b> displays online Help for Banner 9 Administrative applications</li></ul>
	<ul style="list-style-type: none"><li>○ <b>Sign Out:</b> used to Exit the system</li></ul> <p><b>Important Note:</b></p> <ul style="list-style-type: none"><li>➤ Always Sign Out when closing Banner instead of closing your browser</li><li>➤ Ensure not to allow browser to save your credentials</li></ul>
 Ms. Arwa	<ul style="list-style-type: none"><li>○ <b>Profile icon:</b> displays the name of the user currently logged in the system</li></ul>

## Search Box

A rectangular search box with a thin border. Inside, the text "Search..." is written in a light gray font. On the right side of the box, there is a small magnifying glass icon.

Banner Navigator screen offers a “google like” experience for navigating throughout Banner Admin pages and workflows using search box.

You can Search for pages by typing the descriptive name of the page, or the seven-acronym for the page. As the search data is entered, Banner will retrieve potential matches. Click on the desired page name to display the page.

## Keyboard Shortcuts

An icon at the bottom of the home page offer some of the main shortcuts used to navigate Banner Admin pages. Banner Admin pages. Visit (<https://itfaq.aus.edu/faq/284>) for a list of additional shortcuts.

## Accessing and Navigating Banner Pages

Banner admin pages can be accessed using any of the three navigation buttons.

1. The page **Applications Button**
2. The **Search Button**
3. Home Page **Search field**



These options allow you to search for a page using the page name (e.g. SPAIDEN), parts of the page name (e.g. AIDEN) or the page name description (e.g. Person).

As the information is entered in the Search field, the system displays the matches. Use of the full-page name provides quick, direct access.



## Banner Page Display

Banner 8 form displayed many parts of a Banner form including the menu bar, the toolbar, and the key block.

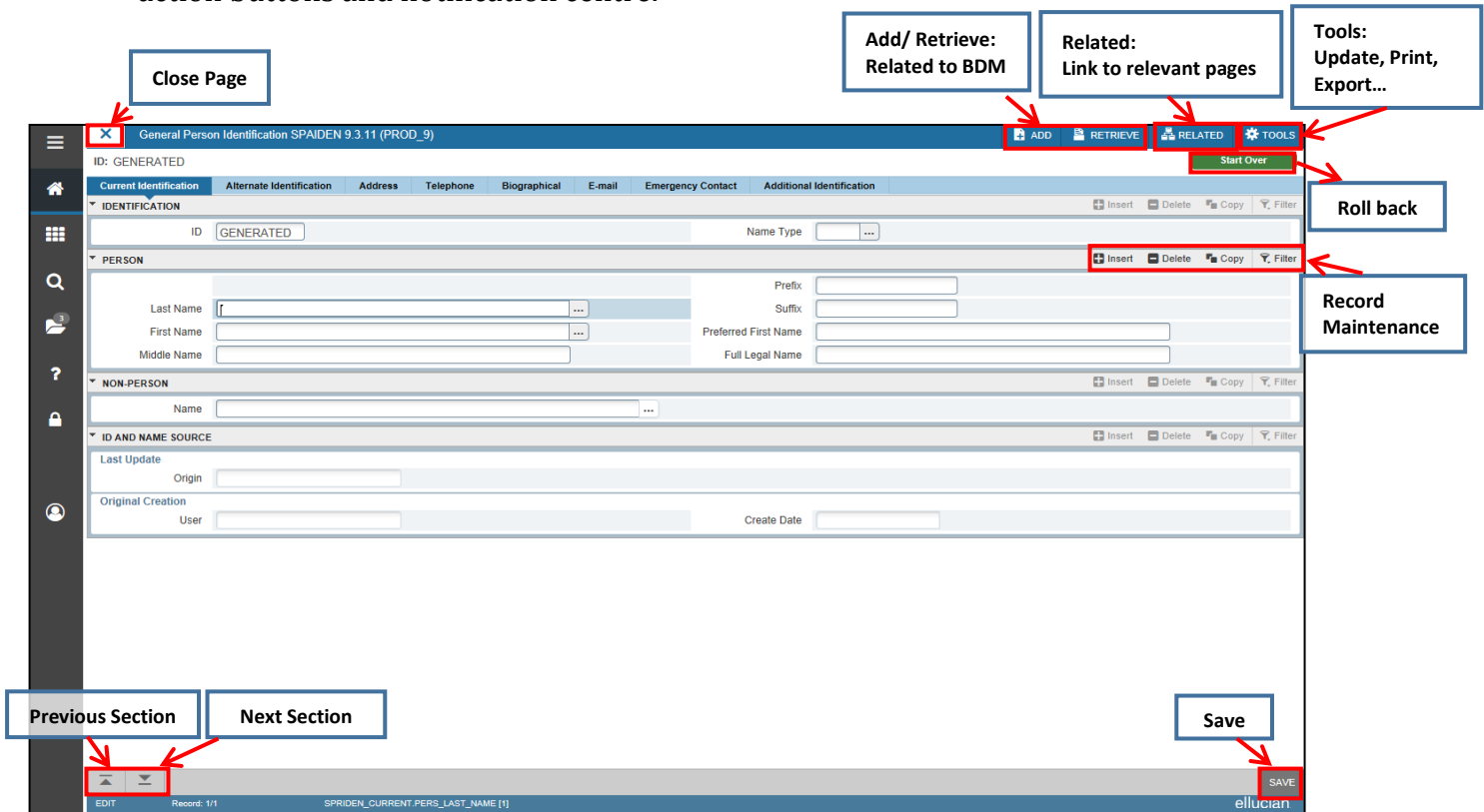
The screenshot shows the Banner 8 form interface. At the top, a red box highlights the menu bar with options: File, Edit, Options, Block, Item, Record, Query, Tools, Help. To the right, a red box highlights the toolbar. Below the menu bar, a red box highlights the 'ID:' field, which is part of the 'Key Block'. The main form area contains three identical sections for telephone information, each with fields for Telephone Type, International Access, Comment, Address Type, Country Code, Area Code, Phone Number, Extension, Sequence, Activity Date, and User.

Banner 9 initial page display only the **key section**. Full data page is only visible once the record is identified and upon clicking the **GO** button.

The screenshot shows the Banner 9 initial page display. At the top, a red box highlights the 'ID:' field, which is part of the 'Key Section'. To the right, a red box highlights the 'Go' button. Below the key section, a red box highlights the 'GO' button. The main form area contains fields for Telephone Type, Country Code, Area Code, Phone Number, Extension, International Access, Comment, Address Type, and Sequence. The bottom of the screen shows a status bar with 'Record 1 of 9'.

## Basic Navigation

The basic navigation of each page includes the page header, key section, sections, some action buttons and notification centre.



## Page Header

Page header is the first ribbon across the top of the page and it includes several action buttons:

### The X Button – Close Page

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.

### Page Title

Displaying the page descriptive name and its seven-character acronyms.

### Add and Retrieve Buttons

These Buttons are related to Banner Document Management (BDM). It is used to attach, or view related documents.

## Related Button

Buttons that allows you to link to other pages that are related to your process or module.

## Tools Button

Tools button allow you to access additional tools and options.

The content of a particular page tool items may change depending on the page you are viewing.

Note. *Related* and *Tools* menu options have replaced the menu across the top of Banner 8 pages.

## Key Section

The first section on most pages contains key information.

The key section determines what data is displayed on the rest of the pages. Once the information is identified click the **GO** button to view full data page.

You can return to the key section, when you are in the body of the page by clicking the **Start Over** button.

## Page Sections

Each Banner page contains sections (or blocks) of additional data for the key information.

Buttons in the page header, section headers, and at the bottom of the page offer quick access to some of the Banner tools necessary to work on records.

- Each section has a header with descriptions
- Each section has action buttons for record maintenance
- Sections can be expanded or collapsed by clicking on the arrow on the far left of the section
- Navigate through sections by clicking the harder tabs or by using the Previous Section and Next Section buttons at the bottom of the page

The screenshot displays the 'General Person Identification SPAIDEN 9.3.11 (PROD\_9)' application. The top navigation bar includes buttons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The main content area is divided into sections: 'IDENTIFICATION', 'PERSON', 'NON-PERSON', and 'ID AND NAME SOURCE'. The 'PERSON' section is expanded, showing fields for 'Last Name', 'First Name', 'Middle Name', 'Prefix', 'Suffix', 'Preferred First Name', and 'Full Legal Name'. The 'NON-PERSON' section shows a 'Name' field. The 'ID AND NAME SOURCE' section shows 'Last Update', 'Origin', 'Original Creation', 'User', and 'Create Date'. The bottom navigation bar includes buttons for 'EDIT', 'SAVE', and 'ellucian'. A red box highlights the 'EDIT' and 'SAVE' buttons.

## Record Maintenance

Record maintenance within a page is executed using the action buttons: **Insert**, **Delete**, **Copy**, and **Filter**. The Action Buttons appear within each sections of page.

The screenshot displays the 'General Person Identification SPAIDEN 9.3.11 (PROD\_9)' application. The interface includes a top navigation bar with 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons. Below this, there are tabs for 'Current Identification', 'Alternate Identification', 'Address', 'Telephone', 'Biographical', 'E-mail', 'Emergency Contact', and 'Additional Identification'. The 'Current Identification' tab is active, showing a form with fields for 'ID' (GENERATED), 'Name Type', 'Last Name', 'First Name', 'Middle Name', 'Prefix', 'Suffix', 'Preferred First Name', and 'Full Legal Name'. Action buttons 'Insert', 'Delete', 'Copy', and 'Filter' are visible in the top right of the form section. The bottom of the screen shows a status bar with 'EDIT', 'Record: 1/1', 'SPRIDEN\_CURRENT\_PERS\_LAST\_NAME [1]', and a 'SAVE' button.

These items appeared on the ***Record*** Pull down menu in Banner 8.

The screenshot shows the 'American University of Sharjah - Internet - Native Banner (INB)' application. The 'Record' pull-down menu is open, displaying options: 'Previous', 'Next', 'Scroll Up', 'Scroll Down', 'Clear', 'Remove', 'Insert', 'Duplicate', and 'Lock'. The 'Record' option is highlighted. The background shows the 'General Person Identification' form with fields for 'ID', 'Name Type', 'Last Name', 'First Name', 'Middle Name', 'Prefix', 'Suffix', 'Preferred First Name', and 'Full Legal Name'. The 'Current Identification' tab is active, and the 'Generate ID' button is visible.

## Buttons

Banner 9 pages includes some other action buttons.

Button	Description
Go	Allow you to move to the body of the page after initiating the key section.
Start Over	Allow you to roll back to the Key information section of a page.
Section Navigation	Including <i>Previous Section</i> and <i>Next Section</i> control buttons which are used to move between page sections.
Save	Allow you to save changes on the page. It is located at the bottom right corner of the page.

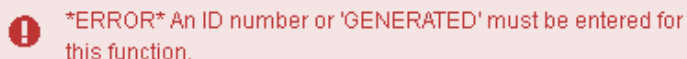
## Message Notification Window

Notification Center (messages at top right) in Banner 9 has replaced Auto hint (messages at bottom left) in Banner 8.

Warning can be cleared by clicking the notification number.

There are four types of warning messages:

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



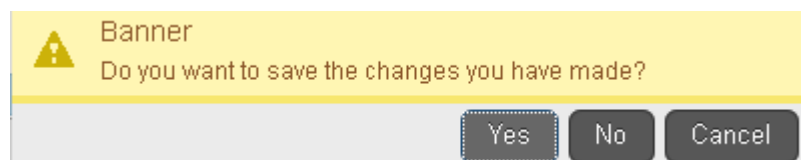
2. **Info Notification** – Will display an “i” in a circle when message is displayed. May display an OK button that you must select to continue



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



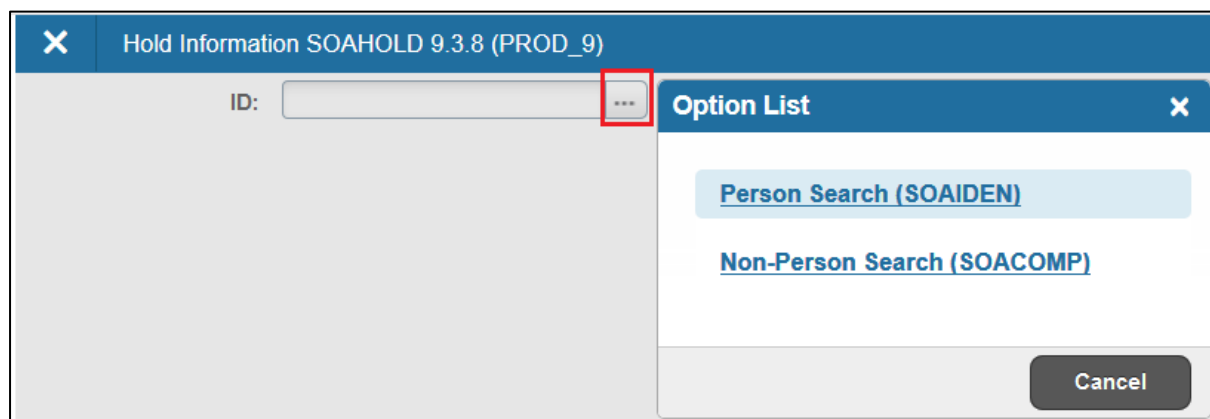
4. **Warning Notification** – Will display a “!” in a yield sign when message is displayed. Will also display buttons, Yes/No/Cancel, that must be selected to continue.



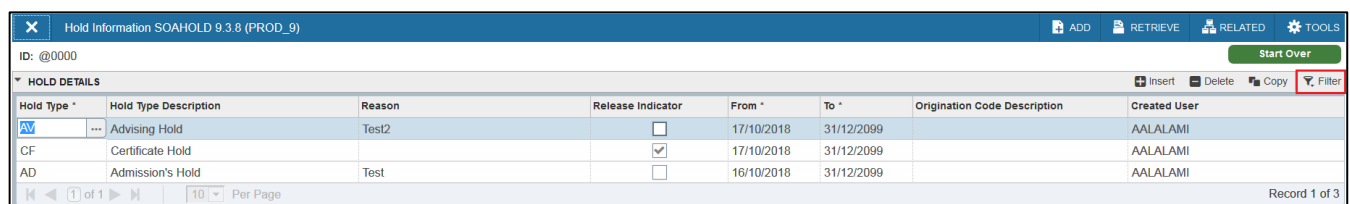
## Search and Filter

Searching for a record can be initiated using the **Search Button**, located to the right of the ID Number entry field, inside the Key Section.

This allows users to add filter fields to restrict the queried data and return specific records in searching by Person or Non-Person.



Filtering replaces the Query feature of Banner 8. You may filter data in a section if there is an active Filter icon in the section header. It is located on the top right of the section header.



Hold Type *	Hold Type Description	Reason	Release Indicator	From *	To *	Origination Code Description	Created User
AV	Advising Hold	Test2	<input type="checkbox"/>	17/10/2018	31/12/2099		AALALAMI
CF	Certificate Hold		<input checked="" type="checkbox"/>	17/10/2018	31/12/2099		AALALAMI
AD	Admission's Hold	Test	<input type="checkbox"/>	16/10/2018	31/12/2099		AALALAMI

Banner has enhanced filtering with the use of language parameters. The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other.)

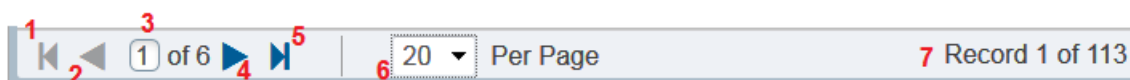
Some filters tip:

- There are two type of filters, Basic Filter and Advanced Filter.
- Filters are case sensitive
- Multiple fields can be selected to narrow results
- Select the appropriate operator from the drop down
- Enter a value type that is consistent with the chosen filter
- Wildcard (%) can still be used to filter when using language parameters: **Like, Starts With, or Ends With.**

## Record Navigation

Admin pages that have multiple records associated within a page are identified by the Page Navigation Buttons located on the bottom left of a page. The number of records associated with the page is displayed.

Page down and Page up is also an option in moving between records within a page. The side scroll bar is no longer an option.



1. First Page: Navigate to the first page of records
2. Previous Page: Navigate to previous page of records
3. Record: Quickly navigate to a specific record by entering the record number
4. Next Page: Navigate to the next page of records
5. Last Page: Navigate to the last page of records
6. Per Page Drop-down: Change the number of records displayed on screen
7. Record Count: Shows which record you have selected and the total number of records

## Sorting

Filter 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.

A screenshot of a web application interface showing a table titled 'Term Code Validation STVTERM 9.3.6 (PROD\_9)'. The table has columns: Term, Term Description, Term Start Date, Term End Date, Term Type, Academic Year, Housing Start Date, Housing End Date, Financial Aid Process Year, and Summer. The first row is highlighted. Below the table, there is a sorting bar with columns: Term, Term Description, Term Start Date, and Term End Date. A red circle and arrow point to a dropdown arrow next to the 'Term' column header in the sorting bar.

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"/>

Term	Term Description	Term Start Date	Term End Date
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## Access Banner 8 In-House Forms / Reports

Banner 8 in-house forms and reports, can still be accessed, following the below steps:

- Login to <http://inb.aus.edu> using **Internet Explorer** web browser
- Type the name of the required form/Report in Banner Search box
- Within banner 9 Navigator , you will be direct to Banner 8 environment

To go back to Banner 9 Home page, click the **Dashboard** icon in the Main menu panel.

### Example

To print a student's schedule, type in **SYSTDSH** to be directed to the Banner 8 form.

The screenshot shows the Banner 8 Student Schedule Report form (SYSTDSH 8.0) in Internet Explorer. The browser's address bar shows the URL <http://inb.aus.edu>. The form is titled "Student Schedule Report: SYSTDSH 8.0 (PROD\_9)". On the left side, there is a vertical navigation menu with icons for Home, Search, and other functions. The Home icon is highlighted with a red box. The main content area contains the following fields:

Select Report:	Student Schedule Report	
Term Code:	201930	Summer 2019
Level Code:	ALL	All Levels
College Code:	ALL	All Colleges
Major Code:	ALL	All Majors
Student ID:		
Sort Key:	College/Student ID	
Generate Text File:	No	
Printing Method:	Screen	
Report Format:	PDF	

At the bottom of the page, there is a banner for the American University of Sharjah (AUS) with the text "AUS | الجامعة الأميركية في الشارقة" and "American University of Sharjah".



## Help and Support

Additional resources to facilitate the transition from Banner 8 to Banner 9 have been organized using the following links:

- ITFAQ: <https://itfaq.aus.edu/faq/banner9>

If you have specific questions concerning Banner upgrade, please send an email to [banner9@aus.edu](mailto:banner9@aus.edu).

If you experience any problems please contact the IT Service Desk: 06 515 2121 or email to [ITServiceDesk@aus.edu](mailto:ITServiceDesk@aus.edu).