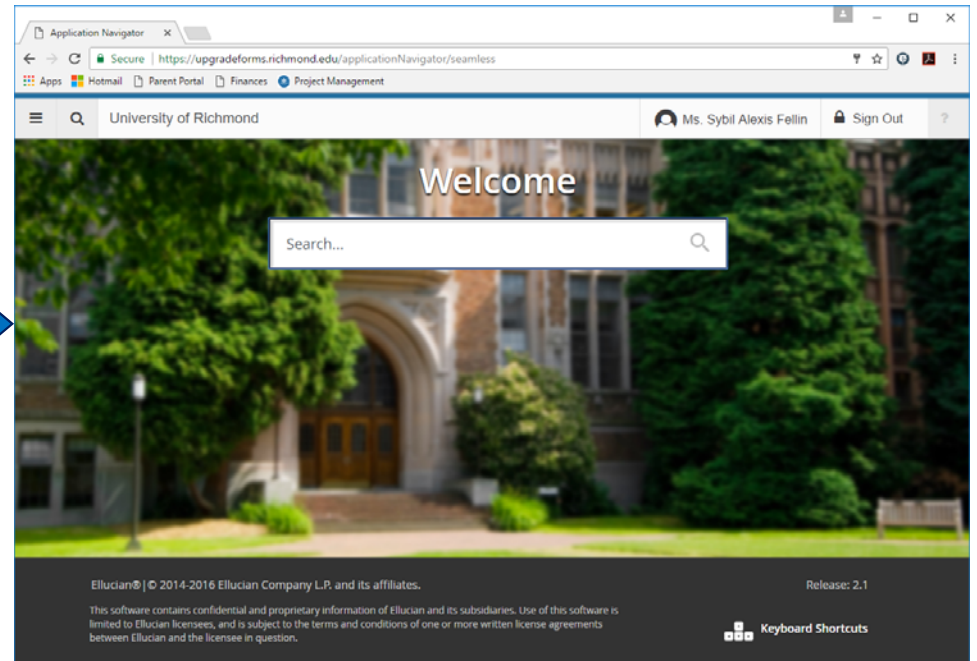
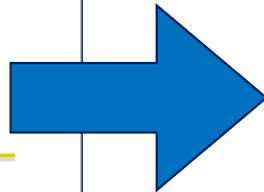
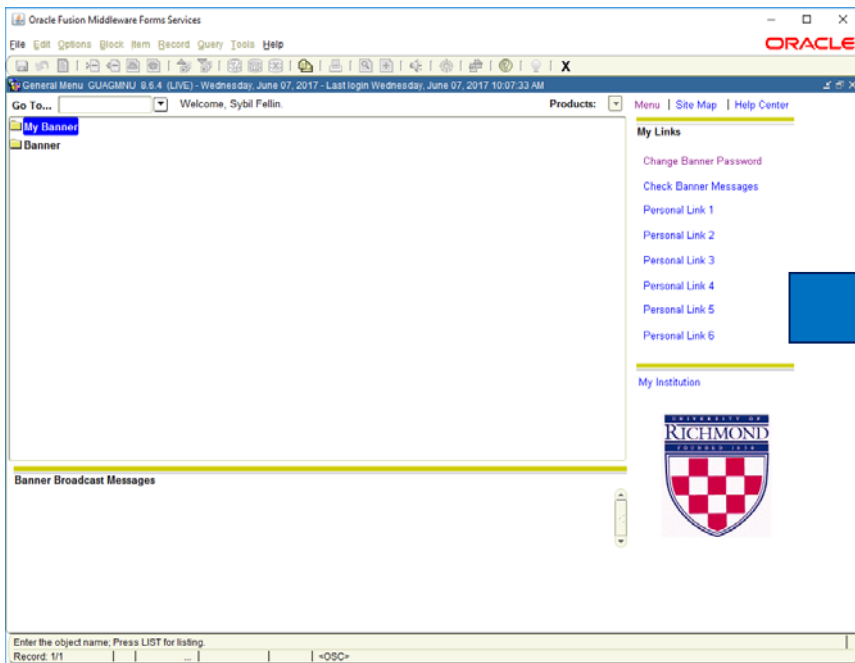


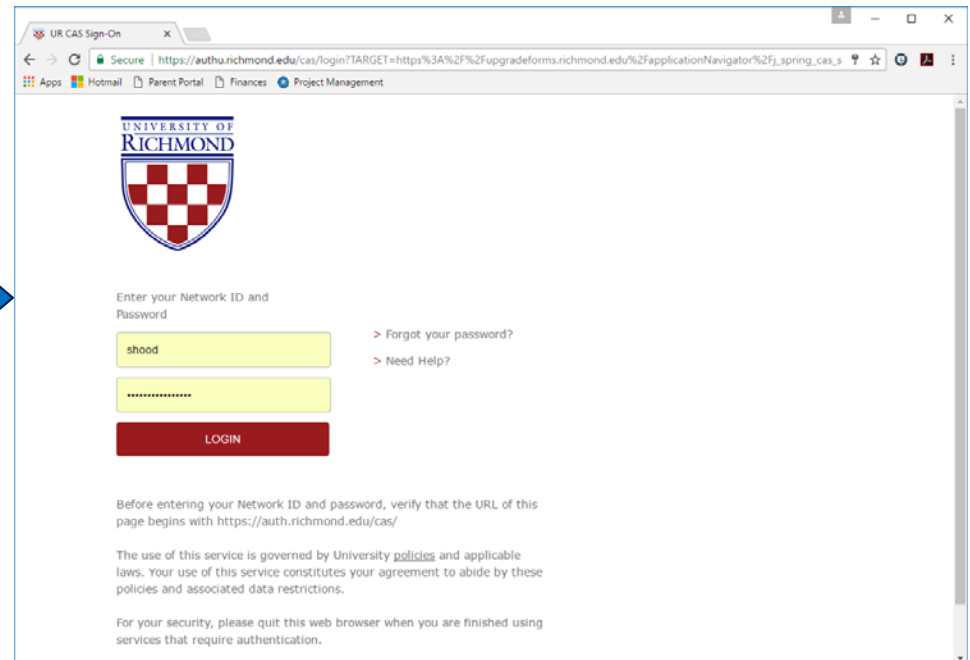
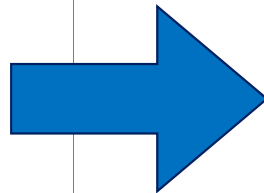
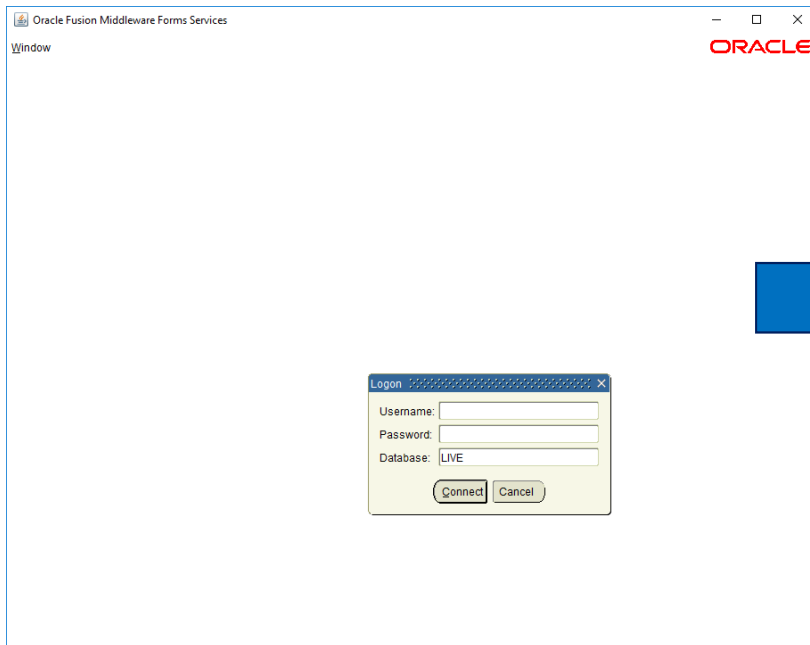
Banner Gets a Facelift...

Coming this August



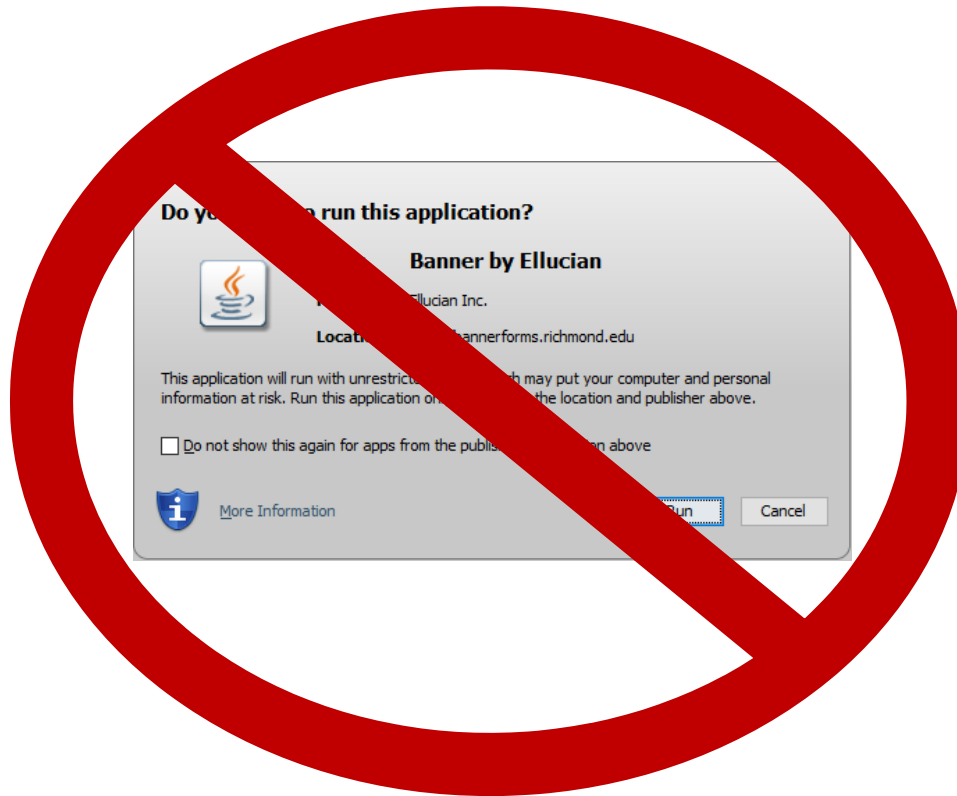
Benefits:

- ❖ No more Banner-specific password. Just log in with your regular credentials (NetID and password – same that you use to log onto your computer, into BannerWeb and Box, etc.)



Benefits:

❖ No more Java!



Benefits:

- ❖ Use whatever modern browser you'd like – no longer tied to Internet Explorer! (*Internet Explorer is not recommended for use with Banner 9 due to slow performance*)



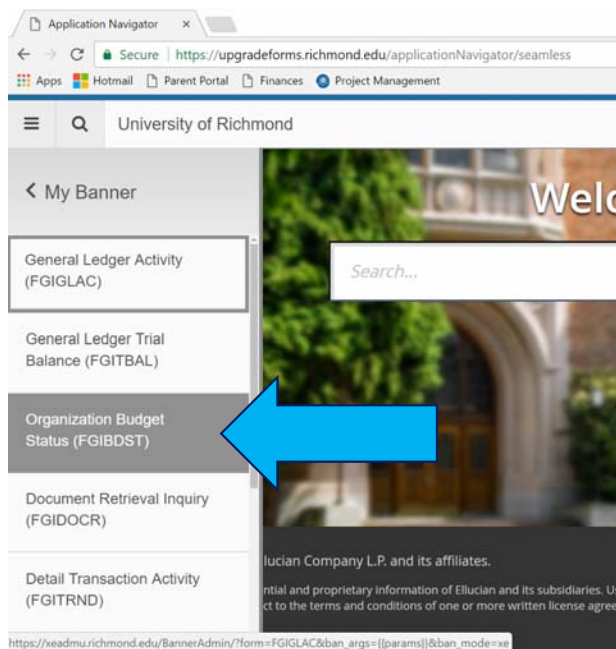
New Navigation – Home Screen

- Forms menus now found under the menu button (☰) at top left of the screen. Use the 'My Banner' menu to see the forms you have saved to your personal menu.

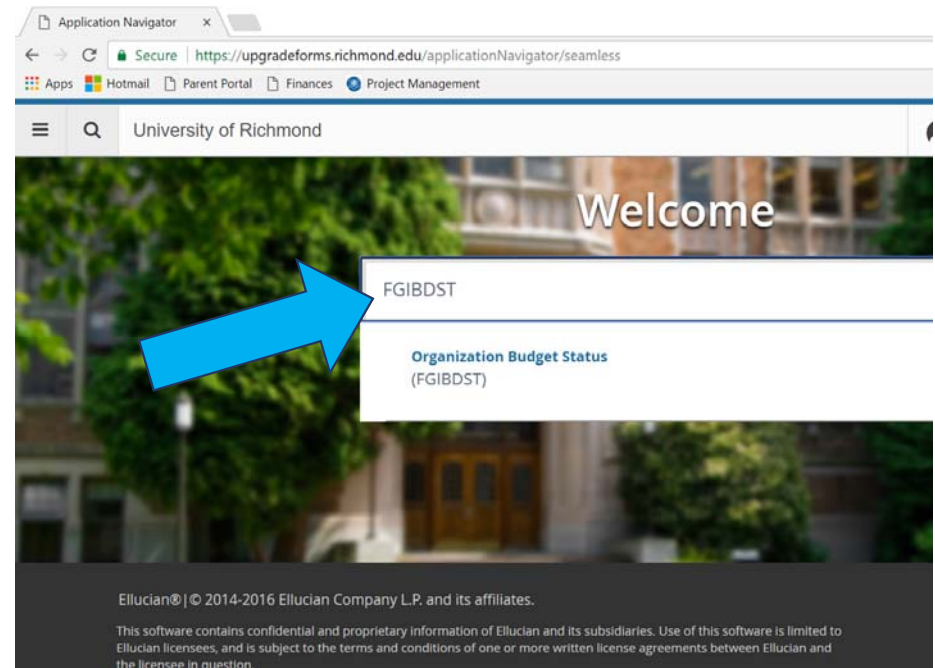
The screenshot displays the Oracle Fusion Middleware Forms Services interface for the University of Richmond. The top navigation bar includes the University of Richmond logo, a search bar, and the user name 'Ms. Sybil Alexis Fellin' with a 'Sign Out' option. The left navigation pane is divided into two sections: 'My Banner' and 'Banner'. The 'My Banner' section is circled in red, and a blue arrow points from this circle to the hamburger menu icon (☰) at the top left of the page. The 'My Banner' menu includes items such as 'General Ledger Activity [FGIGLAC]', 'General Ledger Trial Balance [FGITBAL]', 'Organization Budget Status [FGIBDST]', 'Document Retrieval Inquiry [FGIDOCR]', 'Detail Transaction Activity [FGITRND]', 'Position Budget [NBAPBUD]', 'Position Incumbent List [NBIPINC]', 'Employee Summary View Form [PEIESUM]', 'Employee [PEAEEMPL]', and 'Organize My Banner [GUAPMNU]'. The 'Banner' section is currently empty. The main content area features a 'Welcome' message and a search bar. The footer contains legal notices and keyboard shortcuts.

New Navigation – Home Screen

- Select a form from the navigation menu or type the form name into the search bar to go to that form.



OR



New Navigation – Forms

- Header blocks contain the same fields, although they may be rearranged. The lookup arrow button (▼) has been replaced by the ellipsis button (...).

Oracle Fusion Middleware Forms Services: Open > FGIBDST [Q]

File Edit Options Block Item Record Query Tools Help

Organization Budget Status FGIBDST 8.5 (LIVE)

Chart: [1] [▼] Organization: [] [▼]
Fiscal Year: [17] [▼] Fund: [] [▼]
Index: [] [▼] Program: [] [▼]
 Query Specific Account Account: [] [▼]
 Include Revenue Accounts Account Type: [] [▼]
Commit Type: [Both] [▼] Activity: [] [▼]
Location: [] [▼]

Account	Type	Title	Adjusted Budget	YTD Activity	Commitments

Application Navigator x

Secure | https://upgradeforms.richmond.edu/applicationNavigator/seamless#Organization Budget Status (FGIBDST)

Apps Hotmail Parent Portal Finances Project Management

University of Richmond Ms. Sybil Ale

Organization Budget Status FGIBDST 9.0 (CDBUATDB) ADD RETR

Chart: [1] [...] Fiscal Year: [17] [...]
Index: [] [...] Query Specific:
Account Account Type: [] [...]
Include Revenue: Commit Type: [Both] [▼]
Accounts Fund: [] [...]
Organization: [] [...] Account: [] [...]
Program: [] [...] Activity: [] [...]
Account Type: [] [...] Location: [] [...]

Get Started: Fill out the fields above and press Go.

EDIT Record: 1/1 KEY_BLOCK.KEYBLOC_COAS_CODE [1]

New Navigation – Forms

- To enter the form, after entering desired header info, click the green 'Go' button at the top right or the 'Next Section' (▼) button at the bottom left.

Previously, clicked 'Next Block' button or used CTRL+PgDn

Oracle Fusion Middleware Forms Services: Open > FGIBDST [Q]

File Edit Options Block Item Record Query Tools Help

Organization Budget Status FGIBDS 9.5 (U) (2)

Chart: 1
Fiscal Year: 17
Index: 2071

Organization: 2071 Planning and Budget
Fund: 10000 Current Unrestricted Fund
Program: 261 Administration

Account Type:
Account Type:
Activity:
Location:

Commit Type: Both

Account	Type	Title	Adjusted Budget	YTD Activity	Commitments

Now, click the green 'Go' button, the 'Next Section' navigation arrow, or use ALT+PgDn

University of Richmond Ms. Sybil Alexis Fellin Sign Out ?

Organization Budget Status FGIBDST 9.0 (CDBUATDB)

Chart: 1 Fiscal Year: 17
Index: 2071

Include Revenue:
Accounts
Organization: 2071 Planning and Budget
Program: 261 Administration
Account Type: Location:

Fiscal Year: 17
Query Specific:
Account
Commit Type: Both
Fund: 10000 Current Unrestricted Fund
Account: Activity:

Get Started: Fill out the fields above and press Go.

EDIT Record: 1/1 KEY_BLOCK_QUERY_ACCT [1] ellucian

New Navigation – Forms

- To go back to the header of a form to enter new information, click the green 'Start Over' button at the top right.

Previously, clicked 'Rollback' button or used SHIFT+F7

Oracle Fusion Middleware Forms Services: Open > FGIBDST [Q]

File Options Block Item Record Query Tools Help

Organization Budget Status FGIBDST 8.5 (LIVE)

Chart: 1 Fiscal Year: 17 Index: Query Specific Account: Include Revenue Accounts: Commit Type: Both

Organization: 2071 Planning and Budget Fund: 10000 Current Unrestricted Fund Program: 261 Administration Account: Account Type: Activity: Location:

Account	Type	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
6041	L	Manager Salary FT				
6111	L	Clerical/Staff FT				
6112	L	Clerical/Staff PT				
6113	L	Clerical/Staff OT				
6314	L	Students - Other				
6799	L	Staff Benefit Transfer				
7028	E	Office Supplies				
7029	E	General Materials				

Now, click the green 'Start Over' button or use F5

Application Navigator x

Secure | https://upgradeforms.richmond.edu/applicationNavigator/seamless#Organization Budget Status (FGIBDST)

Apps Hotmail Parent Portal Finances Project Management

University of Richmond Ms. Sybil Alexis Fellin Sign Out ?

Organization Budget Status FGIBDST 9.0 (CDBUATDB) ADD RETRIEVE RELATED TOOLS

Chart: 1 Fiscal Year: 17 Index: Query Specific Account: Include Revenue Accounts: Commit Type: Both Organization: 2071 Planning and Budget Fund: Program: Account: Start Over

Account Type: Activity: Location:

Account	Type	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
6041	L	Manager Salary FT				
6111	L	Clerical/Staff FT				
6113	L	Clerical/Staff OT				
6314	L	Students - Other				
6799	L	Staff Benefit Transfer				
7028	E	Office Supplies				
7029	E	General Materials				
7031	E	Subscriptions & Non-prof Mmbshps				
7032	E	Prof Dues, Fees & Memberships				
7072	E	Printing				
7081	E	Postage				
7101	E	Professional & Contract Services				
7151	E	Employee Travel				
7191	E	Telephone Base				
7193	E	Telephone Tolls				
7231	E	Hardware (Non Cap)				
7233	E	Software (Non Cap)				

EDIT Record: 1/09 FTWACCT_BLOCK.FTWACCT_ACCT_CODE [1] CANCEL SELECT ellucian

New Navigation – Forms

- Associated forms that used to be found under the Options menu are now found under the Related menu. If you don't see something you expect, also check the 'Options' section of the Tools menu (see next slide).

The screenshot displays the Oracle Fusion Middleware Forms Services interface for the 'Organization Budget Status' form. The 'Options' menu in the top-left corner is circled in red, with a dropdown menu showing 'Budget Summary Information [FGIBSUM]', 'Organization Encumbrances [FGIOENC]', 'Transaction Detail Information [FGITRND]', and 'Format Display Preferences'. The top-right navigation bar features a 'RELATED' button, also circled in red, alongside 'ADD', 'RETRIEVE', and 'TOOLS' buttons. The main content area shows a table with columns for Account, Type, Title, Adjusted Budget, YTD Activity, and Commitments. The table lists various accounts such as 6041 (Manager Salary FT), 6111 (Clerical/Staff FT), 6113 (Clerical/Staff OT), 6314 (Students - Other), 6799 (Staff Benefit Transfer), 7028 (Office Supplies), 7029 (General Materials), and 7031 (Subscriptions & Non-prof Mmbrshps).

Account	Type	Title	Adjusted Budget	YTD Activity	Commitments
6041	L	Manager Salary FT			
6111	L	Clerical/Staff FT			
6113	L	Clerical/Staff OT			
6314	L	Students - Other			
6799	L	Staff Benefit Transfer			
7028	E	Office Supplies			
7029	E	General Materials			
7031	E	Subscriptions & Non-prof Mmbrshps			

New Navigation – Forms

- The Tools menu at the top right contains various utilities, including Print and Export. The 'Options' section of this menu (below the 'Actions' section) may contain a list of associated sub-forms as well.

The screenshot displays the University of Richmond Faculty Action Tracking interface. At the top right, the 'TOOLS' menu is circled in red. The main content area shows a form for 'Faculty Action Tracking' with fields for 'Primary Activity' (Instructional), 'Primary Discipline' (BIOLOGY), and 'Academic Title' (Official Biology Teaching Title). A yellow callout box with a red arrow points to the 'Options' section of the Tools menu, which lists various records and document management options.

The 'Options' section of the Tools menu contains the following items:

- Appt or Tenure Records
- Rank Records
- Faculty Leave Records
- BANNER DOCUMENT MANAGEMENT
 - Retrieve Documents
 - Count Matched Documents
 - Add Documents

New Navigation – Forms

➤ Record maintenance is now done using the buttons at the top of the section to be edited.

- ❖ Shortcut keys for record maintenance are unchanged [Insert record = F6; Delete record = SHIFT+F6; Duplicate record = F4]

University of Richmond

Ms. Sybil Alexis Fellin Sign Out ?

General Person Identification SPAIDEN 9.3.3 (CDBUATDB)

ADD RETRIEVE RELATED TOOLS

ID: 54734708 Fellin, Sybil A. Start Over

Current Identification Alternate Identification **Address** Telephone Biographical E-mail Emergency Contact Additional Identification

ADDRESS INFORMATION

Insert Delete Copy Filter

From Date 04/06/2015

To Date

Address Type DP Department

Sequence Number 1

Street Line 1 Planning and Budget Office

Street Line 2 Maryland Hall

Street Line 3

City Univ. of Richmond

State or Province VA Virginia

ZIP or Postal Code 23173

County 760 Richmond City

Nation

Telephone Type DP Department

Area Code 804

Phone Number 6623180

Extension

Inactivate Address

Source

Delivery Point

Correction Digit

Carrier Route

2 of 3 Per Page Record 2 of 3

New Navigation – Forms

- Use the record navigation buttons at the bottom of a section to move through the available records.

The screenshot displays a web application interface for 'University of Richmond'. The main section is titled 'General Person Identification SPAIDEN 9.3.3 (CDBUATDB)'. The user is identified as 'Ms. Sybil Alexis Fellin'. The form is currently on the 'Address' tab, showing 'ADDRESS INFORMATION' for record ID 54734708.

The form fields are organized into two columns:

- Left Column:** From Date (04/06/2015), To Date, Address Type (DP - Department), Sequence Number (1), Street Line 1 (Planning and Budget Office), Street Line 2 (Maryland Hall), Street Line 3, City (Univ. of Richmond), State or Province (VA - Virginia), ZIP or Postal Code (23173).
- Right Column:** County (760 - Richmond City), Nation, Telephone Type (DP - Department), Area Code (804), Phone Number (6623180), Extension, Inactivate Address checkbox, Source, Delivery Point, Correction Digit, Carrier Route.

At the bottom of the form, there is a record navigation bar. The navigation buttons are circled in red. The bar shows '2 of 3' records, indicating the current record is the second of three. Other navigation options include 'Per Page' and 'Record 2 of 3'.

New Navigation – Forms

UR home button stays at the top of the screen and can be used to return to the home page

The screenshot displays the top navigation bar of the University of Richmond web application. On the left, there is a hamburger menu icon, a search icon, and a home button icon. The text 'University of Richmond' is displayed in the center. On the right, the user's name 'Ms. Sybil Alexis Fellin' and a 'Sign Out' button are visible. Below the navigation bar, a blue header contains a close button 'X' on the left and a 'Go' button on the right. The main content area features an 'ID:' input field with a search icon and a plus sign. A grey instruction bar at the bottom reads 'Get Started: Fill out the fields above and press Go.'

The 'Recently Opened' folder keeps track of forms you've visited during your session and allows you to easily navigate back to those forms by selecting one from the list.

Use the 'X' to close the current form and return to the previous form or the home page

New Navigation – Forms

Error messages and informational messages will sometimes pop up at the top right of the screen. You can click the yellow square to hide the message, and click again to display the message again (the number indicates the number of messages to display).

* Note that these messages will cover the 'Go' or 'Start Over' buttons, so you'll need to hide them before you're able to click those buttons.

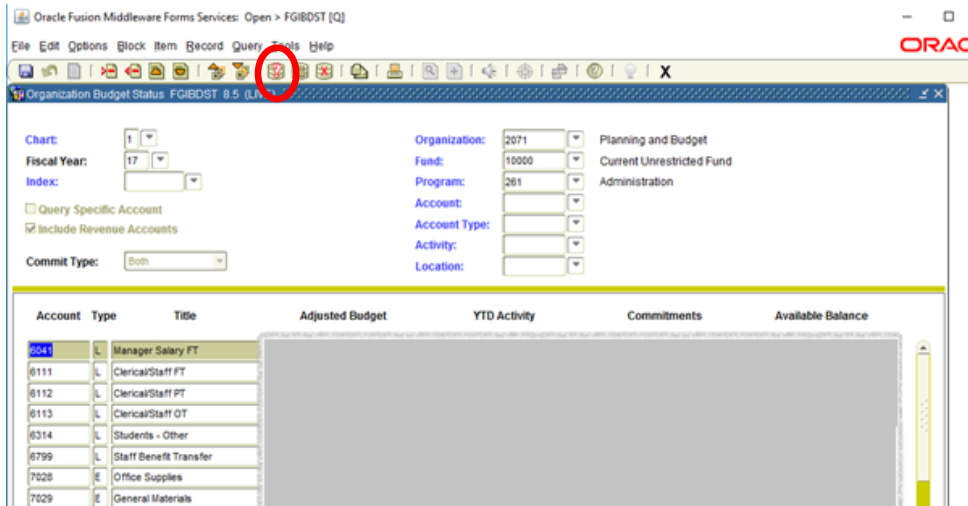
The screenshot displays a web application interface for the University of Richmond. The top navigation bar includes a search icon, the text "University of Richmond", a user profile for "Ms. Sybil Alexis Fellin", and a "Sign Out" button. Below the navigation bar, a blue header shows the current page title "General Student SGASTDN 9.3.4 (CDBUATDB)" and a toolbar with buttons for "ADD", "RETRIEVE", "RELATED", and "TOOL". A yellow square with the number "1" is circled in red, indicating a message notification. An error message box is visible in the bottom right corner, stating: "ERROR* Must enter a valid ID prior to leaving block." The main content area contains input fields for "ID:" and "Term:", a "Student Summary" button, and a "View Current/Active: Curricula" checkbox. A grey banner at the bottom reads: "Get Started: Fill out the fields above and press Go."

New Navigation – Forms

- To query a form to limit the displayed results, select the filter button ( Filter).

Previously, clicked 'Enter Query' button or used F7

Now, click the filter button or use F7



Oracle Fusion Middleware Forms Services: Open > FGIBDST [Q]

File Edit Options Block Item Record Query Tools Help

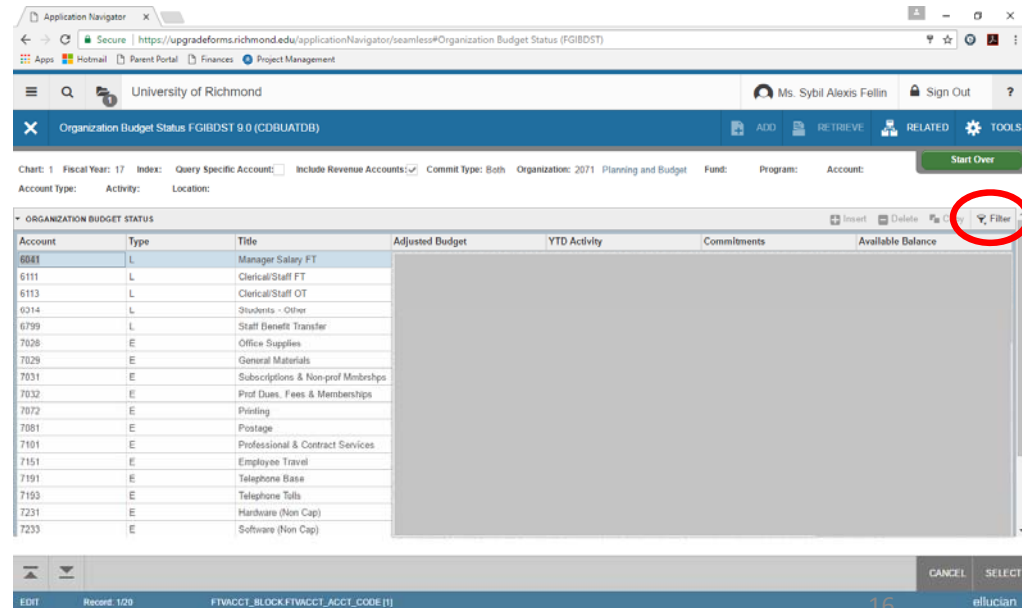
Organization Budget Status FGIBDST 8.5 (L)

Chart: 1
Fiscal Year: 17
Index: []

Organization: 2071 Planning and Budget
Fund: 10000 Current Unrestricted Fund
Program: 261 Administration
Account: []
Account Type: []
Activity: []
Location: []

Query Specific Account
 Include Revenue Accounts
Commit Type: Both

Account	Type	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
6041	L	Manager Salary FT				
6111	L	Clerical/Staff FT				
6112	L	Clerical/Staff PT				
6113	L	Clerical/Staff OT				
6314	L	Students - Other				
6799	L	Staff Benefit Transfer				
7028	E	Office Supplies				
7029	E	General Materials				



Application Navigator x

Secure | https://upgradeforms.richmond.edu/applicationNavigator/seamless#Organization Budget Status (FGIBDST)

Apps Hotmail Parent Portal Finances Project Management

University of Richmond

Ms. Sybil Alexis Fellin Sign Out ?

Organization Budget Status FGIBDST 9.0 (CDBUATDB)

ADD RETRIEVE RELATED TOOLS

Start Over

Chart: 1 Fiscal Year: 17 Index: Query Specific Accounts Include Revenue Accounts Commit Type: Both Organization: 2071 Planning and Budget Fund: Program: Account:

Account Type: Activity: Location:

Account	Type	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
6041	L	Manager Salary FT				
6111	L	Clerical/Staff FT				
6112	L	Clerical/Staff PT				
6314	L	Students - Other				
6799	L	Staff Benefit Transfer				
7028	E	Office Supplies				
7029	E	General Materials				
7031	E	Subscriptions & Non-prof Memberships				
7032	E	Prof Dues, Fees & Memberships				
7072	E	Printing				
7081	E	Postage				
7101	E	Professional & Contract Services				
7151	E	Employee Travel				
7191	E	Telephone Base				
7193	E	Telephone Calls				
7231	E	Hardware (Non Cap)				
7233	E	Software (Non Cap)				

Record: 1/29 FTVACCT_BLOCK.FTVACCT_ACCT_CODE [1]

CANCEL SELECT

ellucian

Filtering

- Basic filtering works similar to entering query criteria in Banner 8.

Previously, entered the value in the actual field(s) on the form (entering 7% in the account field would return all 7xxx account entries)

Oracle Fusion Middleware Forms Services: Open > FGITRND [Q]

File Edit Options Block Item Record Query Tools Help

Detail Transaction Activity FGITRND 8.4.0.3 (LIVE)

COA	Fiscal Year	Index	Fund	Organization	Account	Program	Activity
1	17	2071	10000	2071		261	

Account	Organization	Program	Activity Date	Type	Document
7%					

Now, enter the value in the appropriate field(s) in the basic filter bar (entering 7% in the 'Account' box will return all 7xxx account entries)

University of Richmond (LIVE data as of: 2/18/18)

Ms. Sybil Alexis Fellin Sign Out ?

Detail Transaction Activity FGITRND 9.3.6 (WHA)

COA: 1 Fiscal Year: 17 Index: 2071 Fund: 10000 Organization: 2071 Account: Program: 261 Activity: Location: Period: Commit Type: Both

DETAIL TRANSACTION ACTIVITY

Basic Filter Advanced Filter

Account Organization Program Field Amount Add Another Field ...

7%

Clear All Go

Account	Organization	Program	Field	Amount	Increase (+) or Decrease (-)	Type	Document *	Transaction Date *	Activity Date *	Description	Commit Type	Fund *
---------	--------------	---------	-------	--------	------------------------------	------	------------	--------------------	-----------------	-------------	-------------	--------

Record 1/1

KEY_BLOCKKEYBLK_COAL_CODE [1]

CANCEL SELECT ellucian

Filtering

Enter criteria in as many fields as you'd like; fields left blank will be ignored. You can add criteria for fields not already appearing on the basic filter bar by selecting the desired field from the 'Add Another Field' pick-list.

The screenshot shows the 'Detail Transaction Activity' screen for the University of Richmond. The interface includes a header with the user's name 'Ms. Sybil Alexis Fellin' and a 'Sign Out' button. Below the header, there are navigation options: 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The main section is titled 'DETAIL TRANSACTION ACTIVITY' and contains a 'Basic Filter' section with several input fields: 'Account' (7%), 'Organization', 'Program', 'Field' (ABD), and 'Amount'. There is also an 'Add Another Field ...' pick-list. Below the filter section is a table with columns: Account, Organization, Program, Field, Amount, Increase (+) or Decrease (-), Type, Document *, Transaction Date *, Activity Date *, Description, Commit Type, and Fund. At the bottom of the filter section, there are 'Clear All' and 'Go' buttons. The 'Go' button is circled in red. The bottom of the screen shows a status bar with 'EDIT', 'Record: 1/1', 'KEY_BLOCK.EXECUTE_BTN [1]', and 'ellucian'.

Use the 'Clear All' button to clear all criteria and start over

Use the 'Go' button, or F8, to return the filtered results on the form (the same as using 'Execute Query' or F8 previously)

Filtering

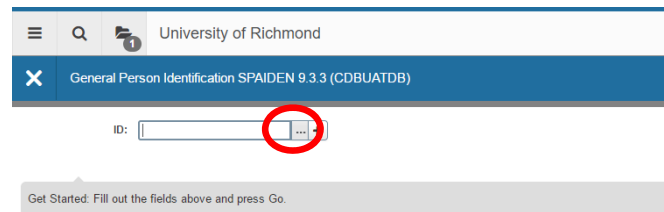
- Banner 9 offers additional filtering functionality to give you greater flexibility. Use the advanced filter to make use of an expanded list of operators (operators will vary based on the type of data in the selected field).

The screenshot displays the Banner 9 Advanced Filter interface. At the top, the user is logged in as Ms. Sybil Alexis Fellin. The page title is "Detail Transaction Activity FGITRND 9.3.6 (WHAK)". Below the title, there are navigation buttons: ADD, RETRIEVE, RELATED, and TOOLS. The main content area is titled "DETAIL TRANSACTION ACTIVITY" and contains a "Basic Filter" section. The "Advanced Filter" tab is selected and circled in red. The filter section includes several rows of fields and operators. The "Amount" field has a dropdown menu open, showing a list of operators: Between, Equals, Not Equal, Not Equal or IS NULL, 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 "Between" operator is highlighted in blue. Below the filter section, there is a table with columns: Account, Organization, Program, Increase (+) or Decrease (-), Type, Document *, Transaction Date *, Activity Date *, Description, Commit Type, Fund *, and Activity. The table is currently empty. At the bottom right, there are buttons for "Clear All", "Go", "CANCEL", and "SELECT". The footer shows "EDIT", "Record: 1/1", and the ellucian logo.

Searching

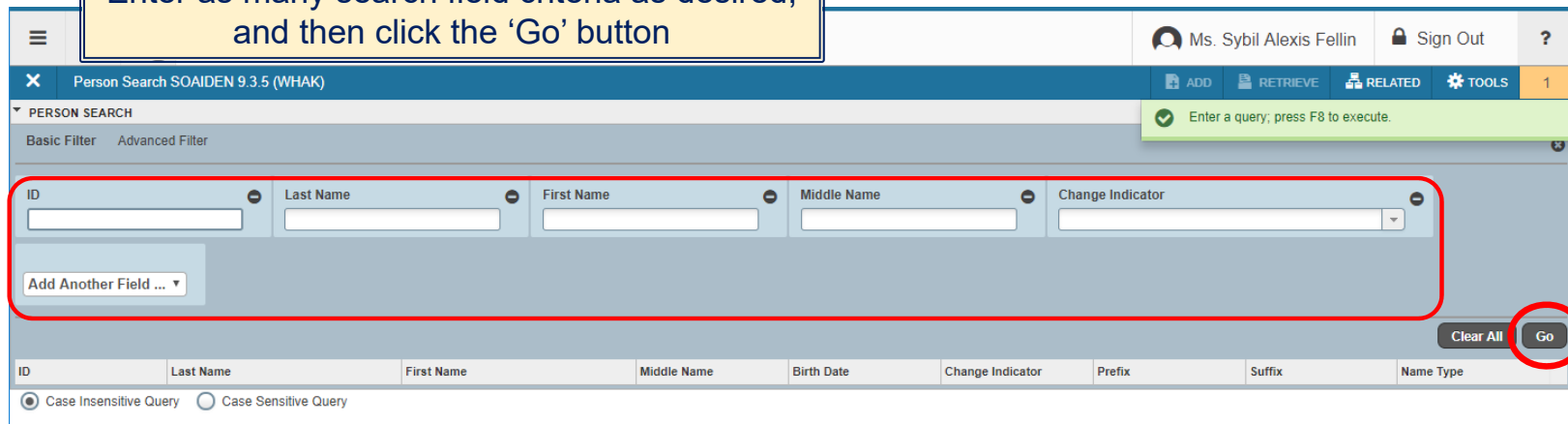
- Searching for a person or vendor works just like filtering.

Click on the ellipsis button next to the ID field to initiate a search



The screenshot shows a search bar at the top of the page with the text "University of Richmond". Below it, there is a section titled "General Person Identification SPAIDEN 9.3.3 (CDBUATDB)". Underneath this title is an "ID:" label followed by a text input field. To the right of the input field is a small square button with three horizontal lines (an ellipsis), which is circled in red. Below the input field, there is a grey box with the text "Get Started: Fill out the fields above and press Go."

Enter as many search field criteria as desired, and then click the 'Go' button



The screenshot shows a more detailed search interface. At the top, there is a navigation bar with a user profile for "Ms. Sybil Alexis Fellin" and a "Sign Out" button. Below this is a header for "Person Search SOAIDEN 9.3.5 (WHAK)" with buttons for "ADD", "RETRIEVE", "RELATED", and "TOOLS". A green notification bar says "Enter a query; press F8 to execute." Below the notification, there are tabs for "Basic Filter" and "Advanced Filter". The main search area contains several input fields: "ID", "Last Name", "First Name", "Middle Name", and "Change Indicator". Each field has a small circle with a minus sign to its right. Below these fields is a button labeled "Add Another Field ...". At the bottom right of the search area, there are two buttons: "Clear All" and "Go", with the "Go" button circled in red. Below the search area, there is a table header with columns: "ID", "Last Name", "First Name", "Middle Name", "Birth Date", "Change Indicator", "Prefix", "Suffix", and "Name Type". At the bottom, there are radio buttons for "Case Insensitive Query" (selected) and "Case Sensitive Query".

Searching

- Alternatively, you can press TAB when in the ID block, which will cause a second entry field to appear to the right. This works as the name search field does in Banner 8. You can type a full name (last, first), or you can type a portion using the '%' as a wildcard. If there is a single match, the ID will auto-fill. If there are multiple matches, you will get a pop-up window allowing you to view all matches or enter additional criteria.

University of Richmond

General Person Identification SPAIDEN 9.3.3 (CDBUATDB)

ID: ...

Get Started: Fill out the fields above and press Go.

Press TAB from the ID field to make this search field appear

When there are multiple matches, this pop-up window allows you to see results (using folder buttons at top) or enter more criteria to narrow your results.

ID and Name Extended Search

Search Detail

Press To See Results Person/Non-Person Count 2

Person Search Detail Non-Person Search Detail

Reduce Search By

Group Type Person Non-Person Both

City

State or Province

ZIP or Postal Code

Name Type

Birth Date

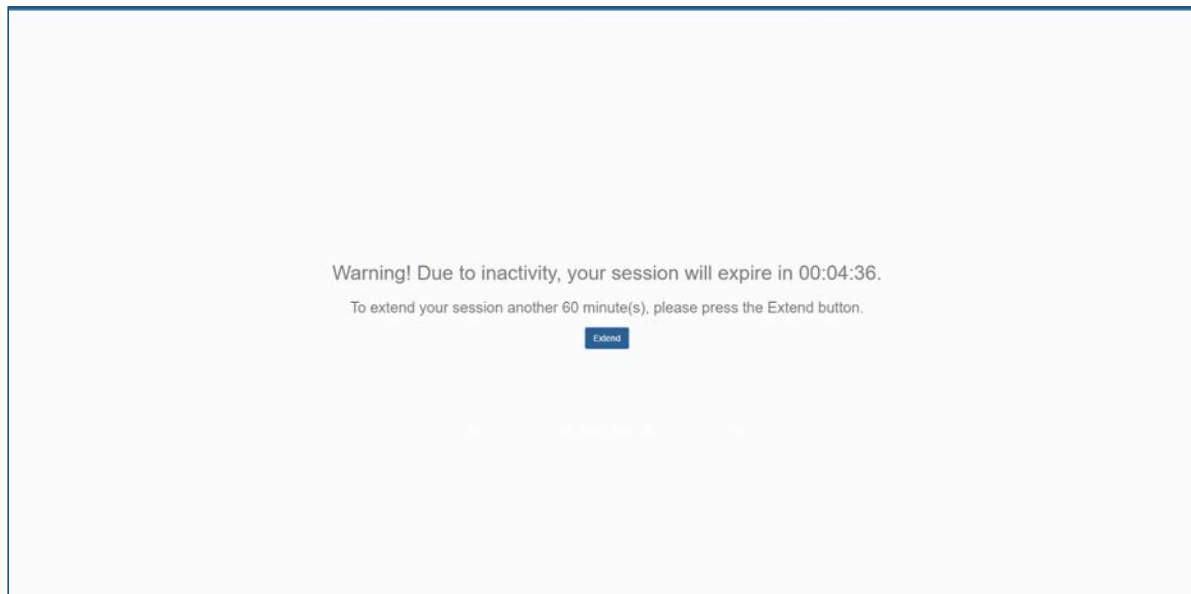
Gender

Press Enter Query or select button to clear search

Enter search criteria then press Execute Query or select button to reduce search

System Timeout – New Warning

- As is currently the case, you will be logged out of Banner after 60 minutes of inactivity. However, a warning message will now display after 55 minutes letting you know that you will be logged out if you don't extend your session. Clicking on 'Extend' will give you a fresh 60 minutes.



Other Resources

- Information Services has a website dedicated to the upgrade to Banner 9 with information and useful resources:
<http://is.richmond.edu/enterprise-systems/banner/banner-upgrade.html>
- For specific questions about a particular form or process, contact the appropriate office for assistance.
- If you discover something that doesn't work properly or you get an unexpected error, email banner@richmond.edu with details about the issue so that someone on the Administrative Systems team can look into it.