Banner Gets a Facelift…

Coming this October
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 browser you’d like – no longer tied to Internet Explorer!
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 ‘Banner Self-Service’ menu will link you directly into BannerWeb, without requiring you to leave the Banner system.
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.
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 The lookup arrow button (▼) has been replaced by the ellipsis button (…).
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

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

Now, click the green ‘Start Over’ button or use F5
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).
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 ‘Options’ section of the Tools menu contains links to associated sub-forms, if they exist for the current form.
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]
New Navigation – Forms

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

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

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.
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.
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
Filtering is the new way of limiting the results shown on the form. It works similar to entering query criteria, except that you specify the field and the value to use in a different way.

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

Now, select the field to specify (Account), then the desired operator from the middle box (Starts With), and then enter the value (7) to return all 7xxx account entries.
Filtering

Multiple fields can be filtered on at once by using the ‘Add Another Field’ box to select another field and enter additional criteria.

<table>
<thead>
<tr>
<th>Account</th>
<th>Starts With</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Starts With</td>
<td>Status</td>
</tr>
</tbody>
</table>

Use the buttons at right to delete a filter criteria, or 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).
Searching

- Searching for a person or vendor works very similar to filtering.

Enter as many search field criteria as desired, and then click the ‘Go’ button.

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

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.
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.