Welcome to Banner 9 Admin General Navigation. This guide is designed to provide you with the information needed to successfully access and navigate Banner 9 Admin.

What is Banner 9 Admin?
Banner 9 Admin is an administrative suite of integrated applications Wright State University has selected to run the information systems used by the University. Banner allows the integration of data between Student, Finance, HR, and Advancement systems.

Banner 9 Admin is a browser-based application, accessible using Chrome, or Firefox. Note: To access Banner off campus, a VPN connection with Wright State’s network or remote desktop must be established. Contact the CaTS Help Desk at (937) 775-4827 to set up the VPN connection or remote desktop.

Banner 9 Admin General Modules
The General System contains the modules that are common to all the Banner application systems.

Banner 9 Admin Application Systems

- Student
- Accounts Receivable
- Financial Aid
- Human Resources
- Advancement
- Finance

General System Modules

- Job Submission
- Population Selection
- Letter Generation
**Job Submission**

This module facilitates the submission of reports and processes throughout Banner. You can define new reports and process to Job Submission, define default parameters, and run Banner reports and processes. You can also set up Job Submission for reports and processes developed on site.

**Population Selection**

This module lets you identify and group entities in the database, such as people, vendors, or organizations. You can define selection criteria to identify and extract a subset of these entities to use in Banner reports, processes, and letters.

**Letter Generation**

This module lets you define extract variables, build paragraphs, build a letter, extract variable data from the database, and merge the extracted variable data into the letter. You can also create a download file that can be used to produce letters with Microsoft Word.
Obtaining Banner 9 Admin Access

The University currently has three user access levels: Business, Student, and Xtender. The ability to view, access, and edit data vary with each access level.

Business Modules:

• Advancement
• Finance
• HR/Payroll

Student Modules:

• Bursar
• General/Registration
• Financial Aid
• Grad Admissions □ Undergrad Admissions

Xtender:

• Student
• Finance
• Alumni
• HR/Payroll

Access requests can be submitted using the Banner Admin Access form located at http://www.wright.edu/information-technology/forms via ServiceNow.
Features

The General System includes the following major features:

• **Comprehensive Reporting:** Both hard-copy reports and online inquiry forms are available.

• **Main Menu:** The Main Menu provides easy access and navigation to infrequent users. Frequent users can use Direct Access or Object Search to bypass the Main Menu.

• **Validation Forms:** Validation Forms standardize the contents of certain fields and control data input. You can specify custom values without programmer intervention.

• Flexible, User-Defined Security - The limited access security system helps ensure that data is viewed and updated by authorized users only. The security feature can accommodate both centralized and decentralized operations.

• In some fields, data can be partially or completely obscured for selected users through techniques called masking and concealing. Fields can also be made completely invisible to users through field hiding.

• Value-based security (VBS) and personally identifiable information security (PII) - both implemented through Oracle's Fine-Grained Access Control (FGAC), can selectively limit the data users can see through Banner forms. The details of the limitations depend entirely on the institution's VBS and PII rules.

• **Online Help:** The Online Help system contains information about forms and fields.

• **Item Properties:** Available from the Tools pull-down menu in Banner; displays column information when it is available.
Types of Banner 9 Admin Pages

Application Pages

Use these forms to enter, update, and query information. This is the most common type of page. Application pages are also referred to as functional pages.

Validation Pages

Validation pages define the values that can be entered in designated fields of Application pages. These values are used throughout Banner as List of Values (LOV) to validate that data has been entered correctly for a specific field.

When the cursor is in a field that must be validated, the Search Icon appears and List of Values appears in the status line, indicating that the entry must be included in the LOV listing. If a value is entered that is not predefined in the LOV, an auto hint message appears stating that an invalid value has been entered.

Rule and Control Pages

Use these pages to define the calculations, parameters, and processing rules that impact processing on other pages, reports, and jobs.

Only University administrators with the proper security permissions may enter new values or update existing validation entries.

Query Pages

Use these pages to look up existing information, often returning information to the calling page.

Inquiry Pages

Use these pages to look up existing information, often returning information to the calling page. Inquiry pages are accessed from the General Menu, within other pages, with Direct Access, or with Object Search.
Logging in to Banner 9 Admin

1. Open a web browser of your choosing.

2. Go to ban9admin.wright.edu.

3. Enter your campus 'w' username and password.

   - If you do not know your password, contact the CaTS Help Desk at (937) 775-4827.
Application Navigator
Application Navigator uses single-sign on to provide access to all Banner 9 administrative applications.

1. **Navigation Bar** (Highlighted in Blue)

2. **Menu Icon:** Provides access to Banner Menu (**Ctrl + M**)

3. **Search:** Provides quick access to search for another page (**Ctrl + Shift + Y**)

4. **Recently Opened:** Provides a menu of your recently accessed pages

5. **Wright State University:** Select to return to the homepage at any time

6. **Sign Out:** Select to sign out of Banner 9 Admin

7. **Help:** Online help accessible from any page in Banner

8. **Keyboard Shortcuts:** Keyboard shortcuts for navigating around the homepage

□ **Note:** This is not the list of shortcuts used when navigating pages. For page navigation shortcuts, see the Keyboard Shortcuts section at the end of this document
My Banner (GUAPMNU)

This page lets you set up and modify your personal menu, My Banner. My Banner gives you easy access to the pages, jobs, reports, menus, and QuickFlows you need to use.

Accessing My Banner

1. Click on the **Menu Icon** in the top left-hand corner

2. Select **My Banner**

Add a Form to My Banner

1. Enter **GUAPMNU** in the search bar.

2. In the **Object Type** column click on the page you want to add

3. Click **Insert Selection**

4. The page will be added to the column on the right. To change the name/description of the page, click into the text box under the **Description** column and type in the new title

5. In the bottom right hand corner, click **Save**
Filtering in My Banner (GUAPMNU)

1. Click into one of the pages listed in the left hand column

2. In the top right hand corner, select Filter

3. In the **Add Another Field** dropdown menu, select **Object**

4. The second dropdown menu will autofill to **Contains**

5. In the text box next to the second dropdown, type in the first letters of the form you want to search for and hit **Enter**, or click **Go**
Page Header

Page Title can be controlled by the user preference page (GUAUPRF).

6. **Exit (Ctrl + Q):** Close page

7. **Page Name**

8. **Add:** Used with Banner Document Management (BDM)/Xtender to add documents

9. **Retrieve:** Used with Banner Document Management (BDM)/Xtender to view documents

10. **Related (Alt + Shift + R):** Provides quick access to pages that can be accessed from this page

11. **Tools (Alt + Shift + T):** Provides access to Actions and Options available from this page
Key Block

The key block determines what data is entered or displayed on the rest of the page. All information on the page is related to the key block. The key block stays on the page as subsequent sections are displayed.

**Go:** Advances to the body of the page after populating the key block

**Start Over:** Returns to the key block of the page
Notifications
Check for messages notifying you of information, successful actions, warnings, and errors.

To exit Notifications, click on the notification number box (highlighted in red) or hit Tab.
Record Navigation

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
Common Actions/Features
If available, individual sections of a page can include actions:

1. **Open/Close Sections**: Click the down or up arrow to open and close sections

2. **Insert (F6)**: Create a new record

3. **Delete (Shift + F6)**: Delete selected record

4. **Copy (F4)**: Copy selected record

5. **More Information (Ctrl + Shift + U)**: Only displays if supplemental data (see Supplemental Data Engine below for more information) can be entered or displayed for the record.

6. **Filter (Query Mode) (F7)**: Filter records/enter Query Mode
   1. Execute (F8)
   2. Exit Query (Ctrl + Q): Exit Query Mode

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Supplemental Data Engine
The Supplemental Data Engine (SDE) allows you to store data that is not part of the Banner data model. The data is displayed in the More Information window.

If supplemental data exists for a section of a page, the More Information button is displayed in the section header. The More Information window is where information can be viewed, edited, or added. When information is added or changed, you are prompted to save the changes. You can continue to work on the primary page.
### Multiple Records

1. **Multiple Record View (grid):**

   ![Multiple Record View](image)

2. **Single Record View**

   ![Single Record View](image)

### Records Displayed in a Grid

1. Sort records by clicking on a column header with a * to display and activate the up (ascending) or down (descending) sort arrow

   ![Sort Records](image)

2. Rearrange the order of columns by dragging the column header to the desired location

   ![Rearrange Columns](image)

3. Resize columns by dragging the end of the column header box, increasing or decreasing its size.

   ![Resize Columns](image)

**Note:** These options come in handy for viewing and printing pages that have too many columns to display on a page.
Page Footer/Section Navigation
1. Previous Selection (Alt + Pg-Up): Navigate to previous block/tab/page
2. Next Selection (Alt + Pg-Down): Navigate to next block/tab/page
3. Record Information: Contains activity date and user
4. Action Buttons:
   1. Save (F10): Save current changes
   2. Cancel (Ctrl + Q): Cancel selection
   3. Select (Alt + S): Select and return value

![Diagram showing navigation options and action buttons]
Looking Up a Client Using the ID Text Box

Searching by UID

1. Enter the UID into the **ID:** text box
2. Click **Go** in the upper right hand corner or hit **Enter**

Searching by Name

3. From any page with an ID field, click into the **ID:** text box
4. Hit **tab**; a second text box will appear on the right where you can enter the name of the client you want to search for (last name, first name, or by using the % Wildcard)
5. Press **Go** in the upper right hand corner or hit **Enter** to view the results of the name search

**Note:** Clicking the ellipses to the right of the **ID:** text box will bring up an Option List to search using different criteria.
Banner 9 Admin Job Submission

1. Enter the page name in the Application Navigator and hit Enter. The GJAPCTL page will appear with the Process in the upper left corner.

2. Navigate to the next section (Alt + PageDown, Go button, or Next Section button in the lower left hand corner) to access Printer Control, Parameter Values and input any changes needed.
   - Note: Page navigation arrows may be needed to access all parameters

3. Navigate to the next section to access Submission and save your parameters with or without a name, etc

4. Run your Banner Process (F10, or Save button in the lower right hand corner)

5. After running the Process, a Notification appears with the job numbers and files

6. Access the output for the Process:
   - Close the Notification (via clicking the notification in the upper right or hitting the tab key)
   - Access the Related form (via clicking the Related icon in the upper right or Alt+Shift+R)
     - Select Review Output (GJIREVO) via clicking on it in the Related drop-down menu or using down+arrow to highlight the drop-down menu item and then hitting Enter.

7. The GJIREVO page displays the Process and Number as in the earlier Notification. To view the output, select the File Name (via F9 or clicking the drop-down menu. Output records are typically in the .lis file).

8. After selecting the File Name, click the OK button or hit Enter. This will display output in the Saved Output Review section of the form.
   - To bring up the print page, click on the Tools icon and select Print.
   - Make sure the correct printer is selected, and hit OK to print your document.

9. To view the Process output in a separate browser window, access the Tools menu (via clicking on the Tools button at the upper right or Alt+Shift+T).
   - Within the drop-down Tools menu, select the Show Document (Save and Print File) row (via clicking on it, or using down+arrow and then clicking Enter).
   - Depending on your Data Extract format setting in GUAUPRF Directory Options:
     - If set to FILE:
       - A Notification appears to ask if you wish to continue. Click Yes.
       - A new web page will appear, from which you can use the Browser to search, save, print, etc.
       - Close browser tab/window to return to GJIREVO
     - If set to WEBUTIL:
       - A Notification window will come up asking you to Save File
       - After clicking on Save File, your file will download and appear in the lower left status area of your browser window.
       - You can open your file or go to your Downloads folder to view/print the file.
<table>
<thead>
<tr>
<th>APPLICATION NAVIGATOR</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Help</td>
<td>CTRL + M</td>
</tr>
<tr>
<td>Access Menu</td>
<td>CTRL + Y</td>
</tr>
<tr>
<td>Display Recently Opened Items</td>
<td>CTRL + SHIFT + L</td>
</tr>
<tr>
<td>Search</td>
<td>CTRL + SHIFT + Y</td>
</tr>
<tr>
<td>Sign Out</td>
<td>CTRL + SHIFT + F</td>
</tr>
<tr>
<td>BANNER DOCUMENT MANAGEMENT (BDM)</td>
<td></td>
</tr>
<tr>
<td>Add BDM Documents</td>
<td>ALT + A</td>
</tr>
<tr>
<td>Retrieve BDM Documents</td>
<td>ALT + R</td>
</tr>
<tr>
<td>Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)</td>
<td>CTRL + Q</td>
</tr>
<tr>
<td>Change MEP Context</td>
<td>ALT + SHIFT + C</td>
</tr>
<tr>
<td>Choose/Submit</td>
<td>ENTER</td>
</tr>
<tr>
<td>Clear All in Section</td>
<td>SHIFT + F5</td>
</tr>
<tr>
<td>Clear One Record</td>
<td>SHIFT + F4</td>
</tr>
<tr>
<td>Clear Page or Start Over</td>
<td>F5</td>
</tr>
<tr>
<td>Count Query</td>
<td>SHIFT + F2</td>
</tr>
<tr>
<td>Delete Record</td>
<td>SHIFT + F6</td>
</tr>
<tr>
<td>Down/Next Record</td>
<td>Down Arrow</td>
</tr>
<tr>
<td>Duplicate Item</td>
<td>F3</td>
</tr>
<tr>
<td>Duplicate Selected Record</td>
<td>F4</td>
</tr>
<tr>
<td>Edit</td>
<td>CTRL + e</td>
</tr>
<tr>
<td>Execute Filter Query</td>
<td>F8</td>
</tr>
<tr>
<td>Exit</td>
<td>CTRL + Q</td>
</tr>
<tr>
<td>Expand/Collapse Drop-Down Field</td>
<td>ALT + Down Arrow</td>
</tr>
<tr>
<td>Export</td>
<td>SHIFT + F1</td>
</tr>
<tr>
<td>First Page</td>
<td>CTRL + Home</td>
</tr>
<tr>
<td>Insert/Create Record</td>
<td>F6</td>
</tr>
<tr>
<td>Last Page</td>
<td>CTRL + End</td>
</tr>
<tr>
<td>List of Values</td>
<td>F9</td>
</tr>
<tr>
<td>More Information</td>
<td>CTRL + SHIFT + U</td>
</tr>
<tr>
<td>Next Field or Item</td>
<td>Tab</td>
</tr>
<tr>
<td>Next Page Down</td>
<td>Page Down</td>
</tr>
<tr>
<td>Next Section</td>
<td>ALT + Page Down</td>
</tr>
<tr>
<td>Open Menu Directly</td>
<td>CTRL + M</td>
</tr>
<tr>
<td>Open Related Menu</td>
<td>ALT + SHIFT + R</td>
</tr>
<tr>
<td>Open Tools Menu</td>
<td>ALT + SHIFT + T</td>
</tr>
<tr>
<td>Page Tab 1, Page Tab 2, etc</td>
<td>CTRL + SHIFT + 1, CTRL + SHIFT + 2, ETC</td>
</tr>
<tr>
<td>Previous Field or Item</td>
<td>SHIFT Tab</td>
</tr>
<tr>
<td>Previous Page Up</td>
<td>Page Up</td>
</tr>
<tr>
<td>Previous Selection</td>
<td>ALT + Page UP</td>
</tr>
<tr>
<td>Print</td>
<td>CTRL + p</td>
</tr>
<tr>
<td>Refresh or Rollback</td>
<td>F5</td>
</tr>
<tr>
<td>Save</td>
<td>F10</td>
</tr>
<tr>
<td>Search or Open Filter Query</td>
<td>F7</td>
</tr>
<tr>
<td>Select on a Called Page</td>
<td>ALT + S</td>
</tr>
<tr>
<td>Toggle Multi/Single Records View</td>
<td>CTRL + G</td>
</tr>
<tr>
<td>Up/Previous Record</td>
<td>Up Arrow</td>
</tr>
<tr>
<td>WORKFLOW</td>
<td></td>
</tr>
<tr>
<td>Release Workflow</td>
<td>ALT + Q</td>
</tr>
<tr>
<td>Submit Workflow</td>
<td>ALT + W</td>
</tr>
</tbody>
</table>

Frequently Asked Questions

Will QuickFlows still be available in Banner 9 Admin?

QuickFlows will still be available in Banner 9 Admin. For information about creating and using QuickFlows, visit http://www.wright.edu/information-technology/services/banner-9.

What is a name search?

A name search is a way to look through the Banner system to find the ID of a person or organization, with an unknown UID, that may have records within the system.

*Important Information about Name Searching:*

- Name Searching is not case sensitive
- Name Searches can be done from any form that requires a UID
- Enter as few letters in the name as possible to get the broadest search
- Be cautious of multiple spellings of names

Why can't I do an insert and copy a previous record like I did in Banner 8?

Banner 9 only requires you to highlight the record you want to copy and select the Copy action (F4).

Why are the Insert, Delete, and Copy actions deactivated (grayed out)?

You must have your cursor active in the section you want to use the action in. If these actions are not available for that section, they will remain deactivated.

What do I do if I get a Service Invocation Failed error message?

Sign out of Application Navigator using the Sign Out link in the upper right corner. Access Banner 9 Admin again, OR clear your browser cache and cookies. Close your browser windows and access Banner 9 Admin again.

If you want a more permanent solution, change your browser settings to always delete cookies when you close the browser.
Do I have to continue to Microsoft Internet Explorer (IE) to access Banner 9 Admin?

Unlike Banner 8 admin, Banner 9 Admin is not browser dependent. You may use Firefox, Chrome, or Microsoft Edge to access Banner 9. It is not recommended that you use IE for Banner 9. IE has been reported to not fully support the latest web technology.

In Banner Job Submission when I select Show Document (Save and Print File) and click Continue, why don’t I get the new window that displays my output?

If you have pop-up blockers turned on, check to make sure that your browser has not blocked the pop-up window. If the content was blocked, accept the content and try Show Document again.

How do I get rid of the menu column down the left hand side of the page so that I can see the full page?

Click on the menu icon to toggle the menu display on and off. This applies to all icons and items in the page header that use a dropdown display (Menu, Search, Recently Opened, Related, Tools). Each toggles on and off with a mouse click or shortcut key.

How do I display the form name on the Banner 9 Admin menu?

You can do this by going to General User Preferences Maintenance (GUAUPRF) and under the Display Options section, check the box for ‘Display Form Name on Menu’.

How do I get column headers to appear in the .csv file when I export data from a Banner 9 Admin page?

You can do this by going to General User Preferences Maintenance (GUAUPRF) and under the Data Extract section, check the box for ‘Include Header Row in Data Extract’.

Where can I get a list of Banner 9 Admin pages that I have access to?

Go to Object Maintenance (GUAOBJECTS) and Filter on Type Equals FORM.

How do I display more information on a page?

Under Tools and Page Layout you can toggle your page layout between Expanded (more white space) and Compact view. You can also use Ctrl- and Ctrl+ to decrease and increase the font size in your browser (Zoom).

Where did the Next Block, Previous Block and Save buttons go?

In Banner 9, Blocks are now Sections. The Next Section, Previous Section arrows are located in the lower left corner of the page. The SAVE/CANCEL/SELECT buttons are located in the lower right corner of the page, depending on the page.
What's a Wildcard, and how do I use it?

- The % sign is used as the wildcard
- ALWAYS use the wildcard
- You may use more than one wildcard in each name field
- Wildcards may be placed anywhere in the name field. Without the wildcard the system will look for an exact match.*

*Example:

<table>
<thead>
<tr>
<th>Client's Name</th>
<th>Last Name Field</th>
<th>First Name Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob McDonald</td>
<td>Mc%on%</td>
<td>%ob%</td>
</tr>
</tbody>
</table>