



BANNER 9 ADMIN GENERAL NAVIGATION USER'S GUIDE



Computing and Telecommunications Services
WRIGHT STATE UNIVERSITY

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Banner 9 Admin General Navigation - User's Guide

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

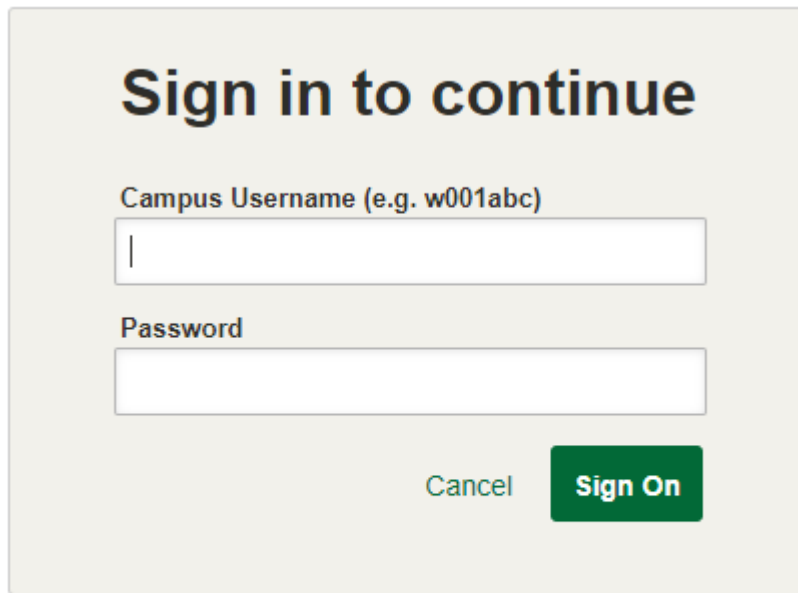
Use these pages to look up existing information, often returning information to the calling page.

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.



Sign in to continue

Campus Username (e.g. w001abc)

Password

Cancel **Sign On**

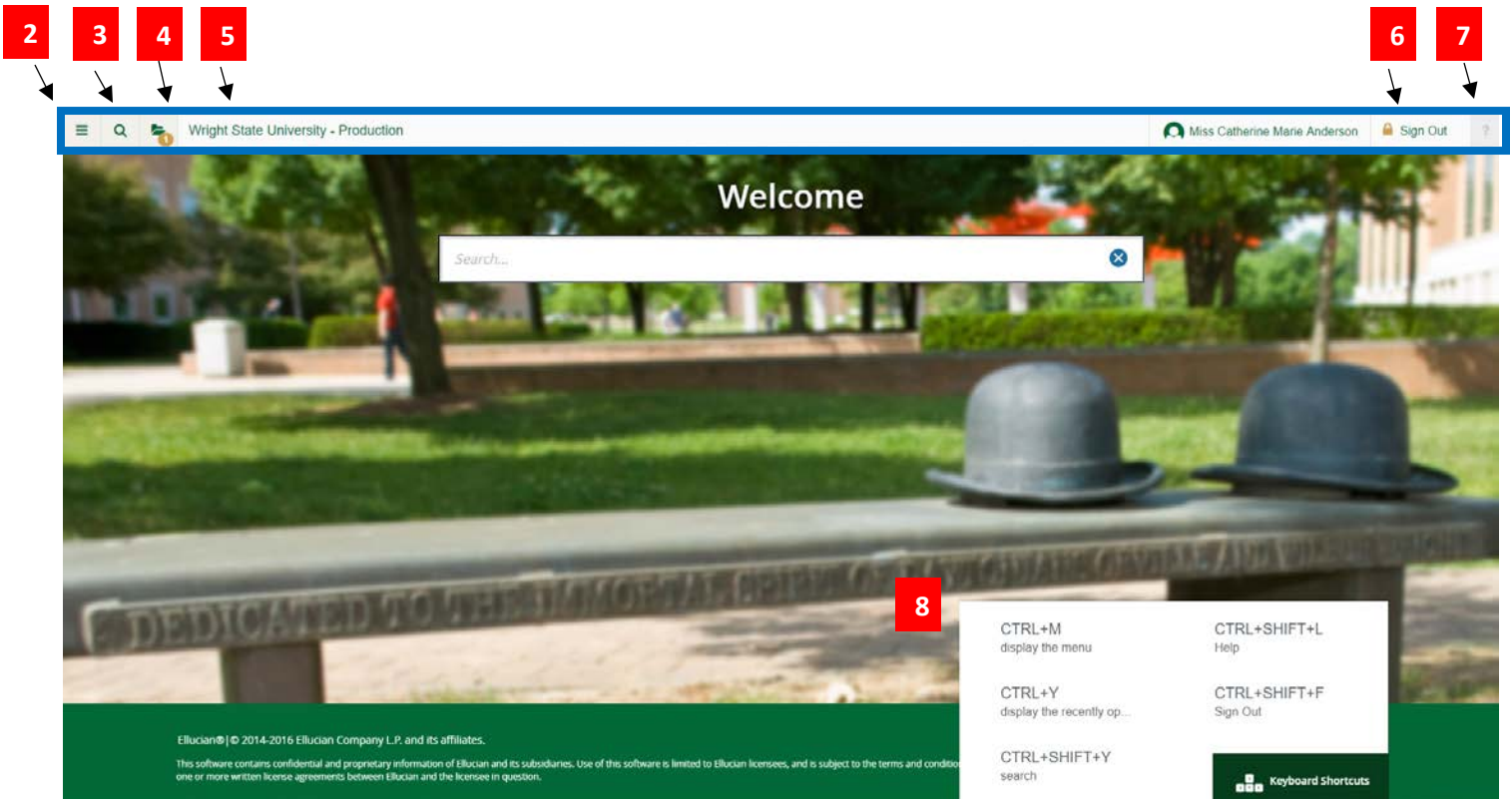
Password Management | CaTS Help Desk
Wright State Accounts

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**

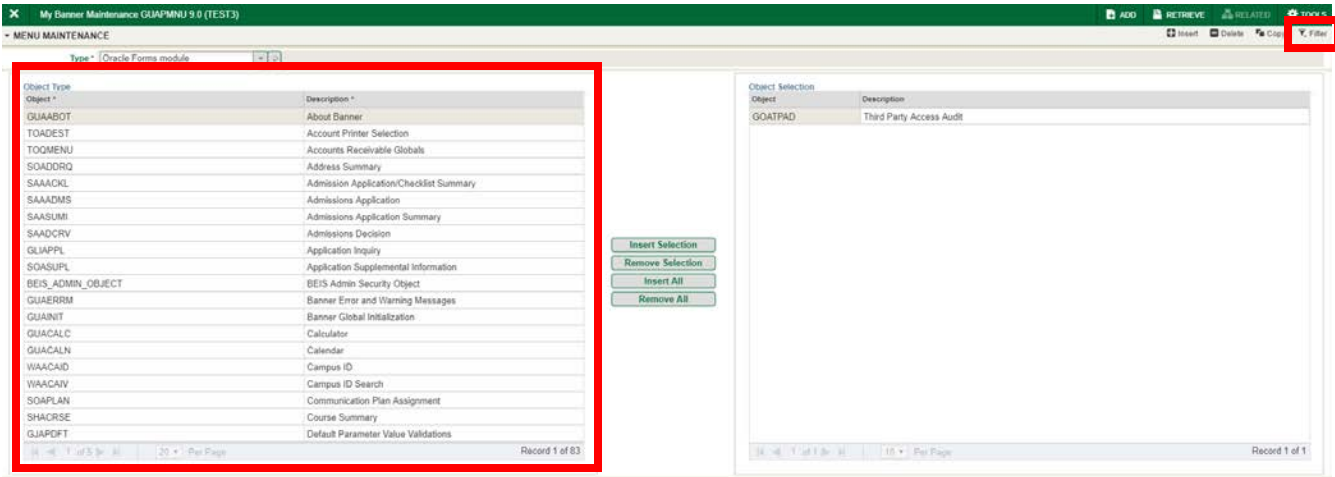
The screenshot displays the 'My Banner Maintenance' interface for 'Wright State University - Production'. The interface is divided into two main columns. The left column, labeled 'MENU MAINTENANCE', contains a table with 'Object Type' and 'Description' columns. A red box with the number '2' highlights the 'Object Type' column. A red box with the number '3' highlights the 'Insert Selection' button located between the two columns. The right column, labeled 'Object Selection', contains a table with 'Object' and 'Description' columns. A red box with the number '4' highlights the 'Object Selection' table. At the bottom right of the interface, a red box with the number '5' highlights the 'SAVE' button.

Object Type	Description
GUAABOT	About Banner
TOADEST	Account Printer Selection
TOGMENU	Accounts Receivable Globals
SOADDRQ	Address Summary
SAAACKL	Admission Application/Checklist Summary
SAAADMS	Admissions Application
SAASUMI	Admissions Application Summary
SAADCRV	Admissions Decision
GLIAPPL	Application Inquiry
SOASUPL	Application Supplemental Information
BEIS_ADMIN_OBJECT	BEIS Admin Security Object
GUAERRM	Banner Error and Warning Messages
GUAINIT	Banner Global Initialization
GUAICALC	Calculator
GUAICALN	Calendar
WAACAID	Campus ID
WAACAIV	Campus ID Search
SOAPLAN	Communication Plan Assignment
SHACRSE	Course Summary
GJAPDFT	Default Parameter Value Validations

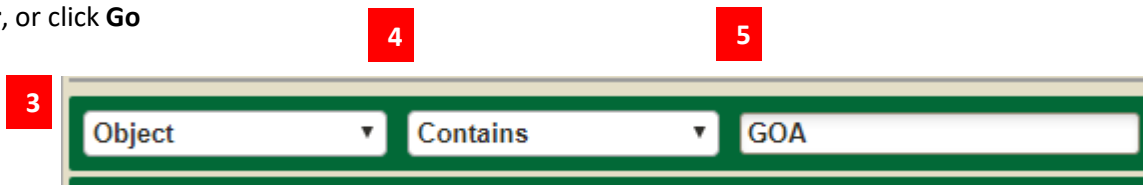
Object Selection	Description
GIATPRD	Third Party Access Audit
WAIPERS	WA Person

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



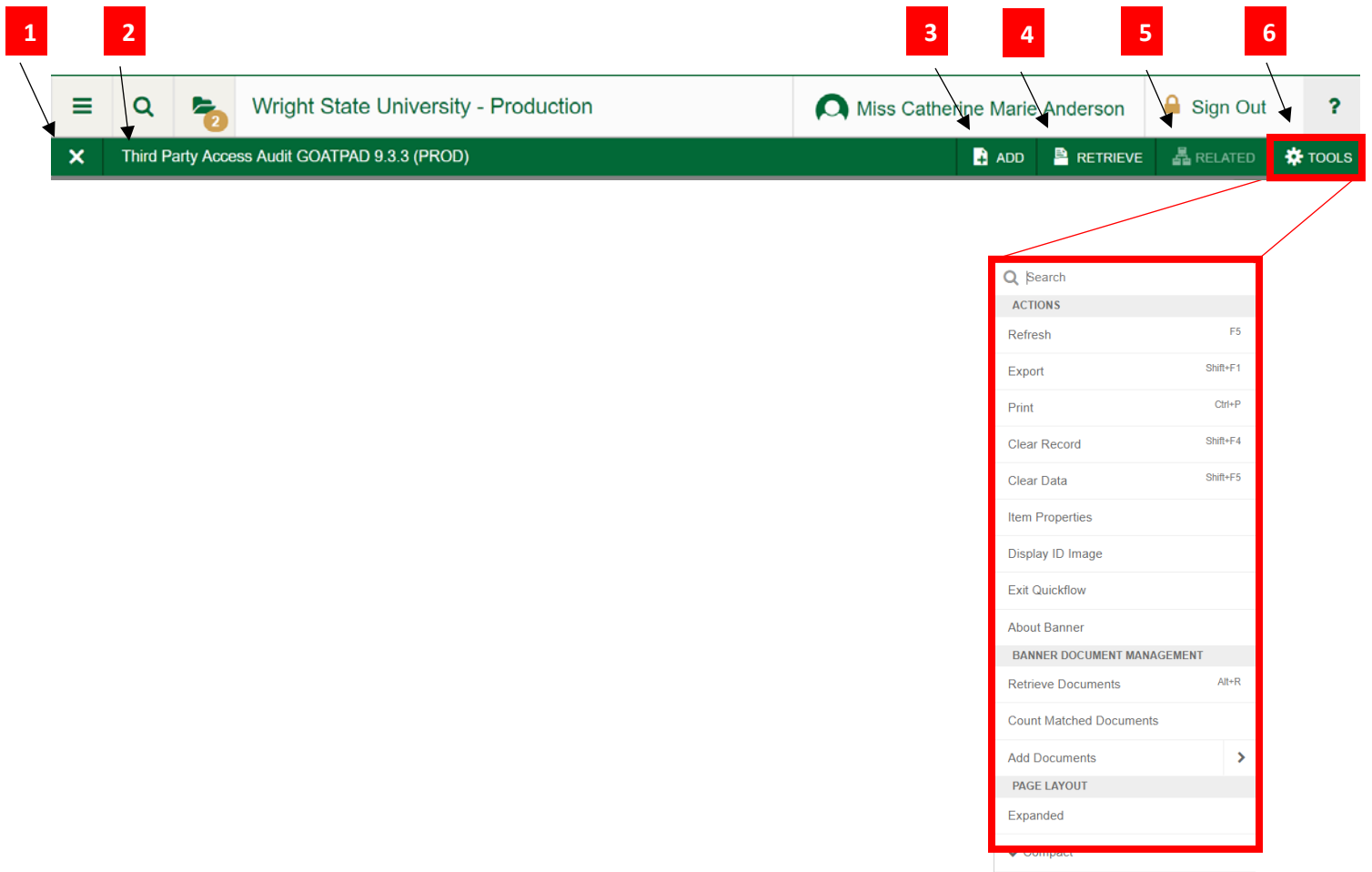
3. In the **Add Another Field** dropdown menu, select **Object**
4. The second dropdown menu will autofill to **Contains**
5. In the text box next to the second dropdown, type in the first letters of the form you want to search for and hit **Enter**, or click **Go**



Page Header

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

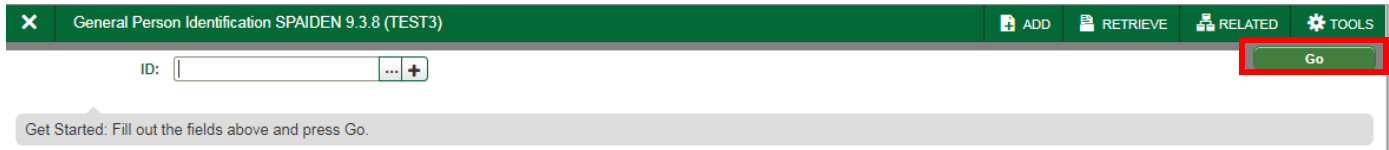
- 6. **Exit (Ctrl + Q):** Close page
- 7. **Page Name**
- 8. **Add:** Used with Banner Document Management (BDM)/Xtender to add documents
- 9. **Retrieve:** Used with Banner Document Management (BDM)/Xtender to view documents
- 10. **Related (Alt + Shift + R):** Provides quick access to pages that can be accessed from this page
- 11. **Tools (Alt + Shift + T):** Provides access to Actions and Options available from this page



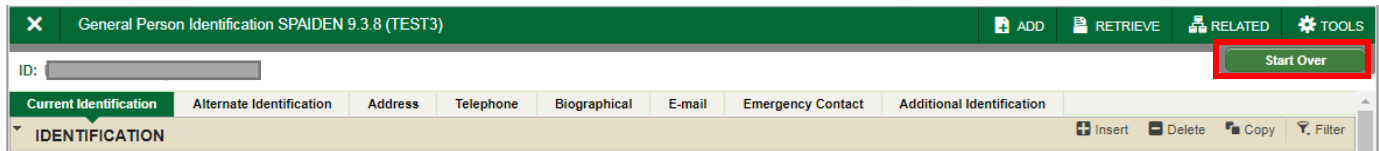
Key Block

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



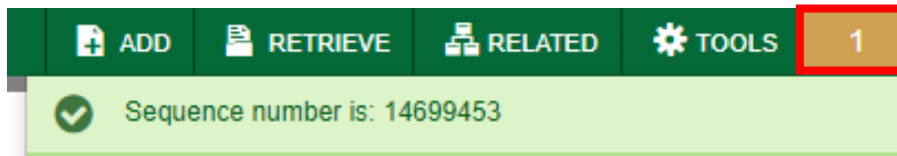
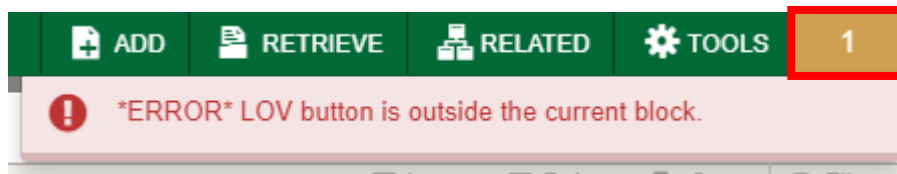
Start Over: Returns to the key block of the page



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

The screenshot shows the 'ADDRESS INFORMATION' form. A red box with the number '1' points to a downward-pointing arrow in the section header. A toolbar at the top right contains five buttons: 'Insert', 'Delete', 'Copy', 'More Information', and 'Filter'. Red boxes with numbers '2' through '6' point to these buttons respectively. The form fields include: 'From Date' (12/04/2006), 'To Date', 'Address Type' (BU Business), 'Sequence Number' (1), 'Street Line 1' (Wright State University), 'Address Verified' (checkbox), 'Skip Address Verify' (checkbox), 'Nation', 'Telephone Type' (BU Business), 'Country Code', and 'Area Code' (937).

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):

Term *	Term Description *	Term Start Date *	Term End Date *	Term Type	Academic Year *	Housing Start Date *	Housing End Date *	Financial A
999999	The End of Time	01/01/2999	05/15/2999		9999	01/01/2999	05/15/2999	9999
202380	Fall 2023	08/28/2023	12/16/2023	S	2024	08/24/2023	12/16/2023	2324
202340	Summer 2023	05/08/2023	07/28/2023	S	2023	05/08/2023	07/28/2023	2324

2. Single Record View

Term: 999999
 Term Description: The End of Time
 Term Start Date: 01/01/2999
 Term End Date: 05/15/2999
 Term Type:
 Academic Year: 9999
 Housing Start Date: 01/01/2999
 Housing End Date: 05/15/2999
 Financial Aid: 9999
 Process Year:
 Summer
 Term:
 Beginning Period:
 Ending Period:
 System Required

1 of 18 | 20 Per Page | Record 1 of 347

Records Displayed in a Grid

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

Term *	Term Start Date *	Term Type	Term Description *	Term End Date *	Academic Year *	Housing Start Date *	Housing End Date *	Financial Aid Process Year	Summer	Term
999999	01/01/2999		The End of Time	05/15/2999	9999	01/01/2999	05/15/2999	9999	<input type="checkbox"/>	
202380	08/28/2023	S	Fall 2023	12/16/2023	2024	08/24/2023	12/16/2023	2324	<input type="checkbox"/>	2
202340	05/08/2023	S	Summer 2023	07/28/2023	2023	05/08/2023	07/28/2023	2324	<input type="checkbox"/>	1

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

Term *	Term Type	Term Start Date *	Term End Date *	Academic Year *	Housing Start Date *	Term Description *	Housing End Date *	Financial Aid Process Year	Summer	Term
999999		01/01/2999	05/15/2999	9999	01/01/2999	The End of Time	05/15/2999	9999	<input type="checkbox"/>	
202380	S	08/28/2023	12/16/2023	2024	08/24/2023	Fall 2023	12/16/2023	2324	<input type="checkbox"/>	2
202340	S	05/08/2023	07/28/2023	2023	05/08/2023	Summer 2023	07/28/2023	2324	<input type="checkbox"/>	1

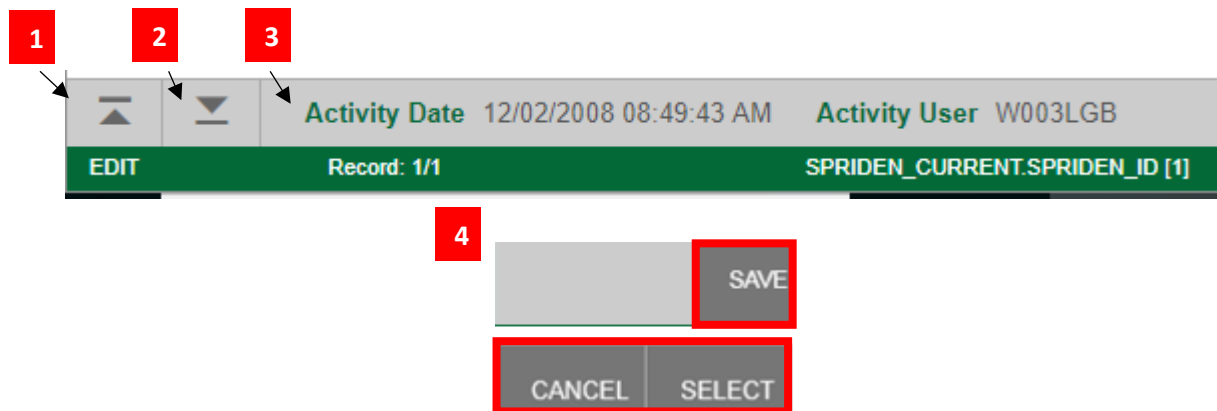
- Resize columns by dragging the end of the column header box, increasing or decreasing its size.

Term *	T...	Term Start Date *	Term End Date *	Academic Year *	Housing Start Date *	Term Description *	Housing End Date *	Financial Aid Process Year	Summer	Term	Beginnin
999999		01/01/2999	05/15/2999	9999	01/01/2999	The End of Time	05/15/2999	9999	<input type="checkbox"/>		
202380	S	08/28/2023	12/16/2023	2024	08/24/2023	Fall 2023	12/16/2023	2324	<input type="checkbox"/>	2	
202340	S	05/08/2023	07/28/2023	2023	05/08/2023	Summer 2023	07/28/2023	2324	<input type="checkbox"/>	1	

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



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.

The image contains two screenshots of a software interface with numbered callouts (1-5) and a dialog box. The first screenshot shows the top navigation bar with 'Wright State University - Production' and 'Miss Catherine Marie Anderson'. Below it is a green bar with 'Third Party Access Audit GOATPAD 9.3.3 (PROD)' and buttons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The 'ID:' text box is highlighted with a red box and arrow labeled '1'. The 'Go' button is highlighted with a red box and arrow labeled '2'. The second screenshot shows the same interface, but the 'ID:' text box now contains 'and%on|' and is highlighted with a red box and arrow labeled '3'. A second text box is visible to the right of the 'ID:' text box, highlighted with a red box and arrow labeled '4'. The 'Go' button is highlighted with a red box and arrow labeled '5'. Below the second screenshot is a dialog box titled 'Option List' with a red border. It contains two options: 'Person Search [SOAIDEN]' and 'Alternate ID Search [GUIALTI]'. A 'Cancel' button is at the bottom right of the dialog box.

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.

APPLICATION NAVIGATOR	
Access Help	CTRL + M
Access Menu	CTRL + Y
Display Recently Opened Items	CTRL + SHIFT + L
Search	CTRL + SHIFT + Y
Sign Out	CTRL + SHIFT + F
BANNER DOCUMENT MANAGEMENT (BDM)	
Add BDM Documents	ALT + A
Retrieve BDM Documents	ALT + R
Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL + Q
Change MEP Context	ALT + SHIFT + C
Choose/Submit	ENTER
Clear All in Section	SHIFT + F5
Clear One Record	SHIFT + F4
Clear Page or Start Over	F5
Count Query	SHIFT + F2
Delete Record	SHIFT + F6
Down/Next Record	Down Arrow
Duplicate Item	F3
Duplicate Selected Record	F4
Edit	CTRL + e
Execute Filter Query	F8
Exit	CTRL + Q
Expand/Collapse Drop-Down Field	ALT + Down Arrow
Export	SHIFT + F1
First Page	CTRL + Home
Insert/Create Record	F6
Last Page	CTRL + End
List of Values	F9
More Information	CTRL + SHIFT + U
Next Field or Item	Tab
Next Page Down	Page Down
Next Section	ALT + Page Down
Open Menu Directly	CTRL + M
Open Related Menu	ALT + SHIFT + R
Open Tools Menu	ALT + SHIFT + T
Page Tab 1, Page Tab 2, etc	CTRL + SHIFT + 1, CTRL + SHIFT + 2, ETC
Previous Field or Item	SHIFT Tab
Previous Page Up	Page Up
Previous Selection	ALT + Page UP
Print	CTRL + p
Refresh or Rollback	F5
Save	F10
Search or Open Filter Query	F7
Select on a Called Page	ALT + S
Toggle Multi/Single Records View	CTRL + G
Up/Previous Record	Up Arrow
WORKFLOW	
Release Workflow	ALT + Q
Submit Workflow	ALT + W

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 (GUAOBS) 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:*

Client's Name	Last Name Field	First Name Field
Bob McDonald	Mc%on%	%ob%