BANNER 9 NAVIGATION

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Introduction

Welcome to Banner 9! This guide will introduce you to a brand new experience using current web technology. While the appearances of menus and forms will have an updated look, the processes you use on a daily basis will remain largely unchanged.
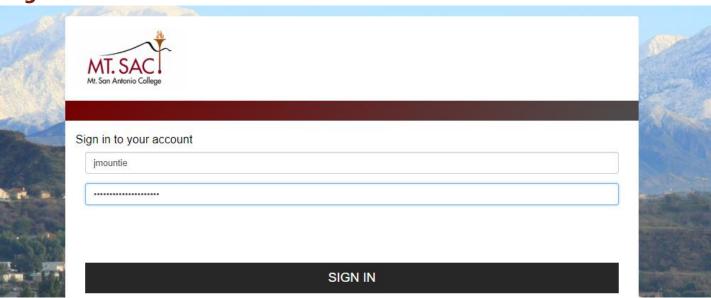
In this guide, the following topics are covered:

- Log in/out of Banner 9
- Main User Interface
- Menu and Navigation
- Forms
- Basic Search
- Customized Menu
- Shortcuts
- Online Help

Learn new terms and those that changed from Banner 8. For example, *Forms* in Banner 8 are called *Pages* in Banner 9.

Please note that this Banner 9 Navigation Guide is a living document and subject to modification at any time.

Login Procedure

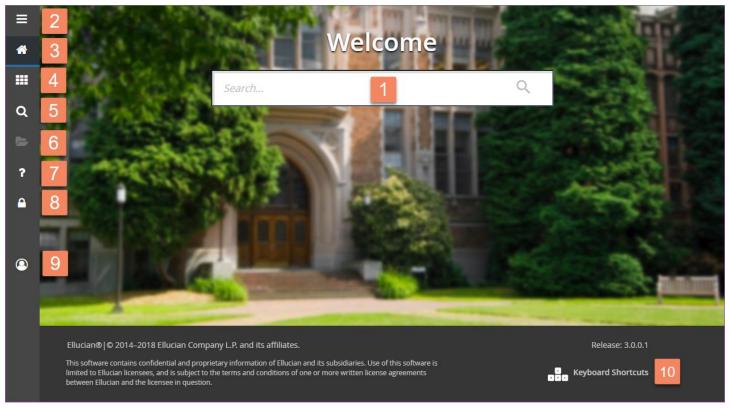Recommended browsers: Google Chrome, Firefox, Safari, Opera

1. Launch any browser other than **Internet Explorer**
2. Navigate to the Banner Home Page: **banner.mtsac.edu** and click on Banner under the Production section
3. Enter your **Mt. SAC Portal** username and password
4. Click the **Login** button to continue
5. If the login process is successful, the next page that appears will be the Banner 9 home page

Banner 9 Home Page

Upon successful login, the main page will display and will look similar to the example below. The table that follows the example provides a brief description of each numbered area.

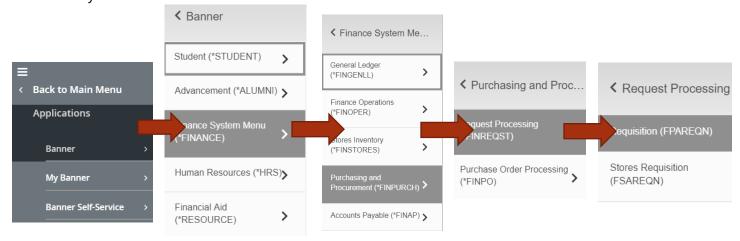| Area	Description
1	Main search bar. Displays suggestions as you type in search terms.
2	Click to open Toggle Menu
3	Click to return to this main Banner 9 page
4	Click to open the main menu bar
5	Global search bar. Available on all screens
6	Displays recently opened pages for quick access
7	Help page (when available)
8	Sign out of Banner 9
9	Full name of current Banner 9 user
10	List of available keyboard shortcuts

Search Field

For quick access to any Banner object, begin typing the name in the search field featured prominently in the center of the main page. As you start typing, Banner will display suggested object names. Continue typing until the name of the object appears in the list, point and click to open that object.

Global Main Menu

Clicking the button in the top left corner (or Ctrl-M on your keyboard) will display the main menu at the top level. See the below menu navigation example. As the name implies, the global main menu will always be available anywhere in Banner.

Clicking on the arrow will display the available Banner modules

- Click on the arrow in a module listing to view module sections
- Click on the arrow in a section listing to view the available Banner forms (now referred to as *pages*)
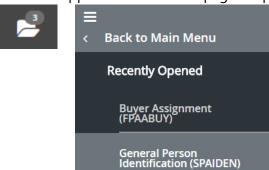- Point (highlight) and click on an available Banner pages to view

Global Search Bar

A search bar is also available and located on the left side menu of every Banner 9 screen. This search bar performs in a similar manner to the main page search field.

Recently Opened Pages

Click the *folder icon* to display a list of recently opened pages. Point and click on a page in the list to access. This icon appears after the first page is opened during the current session.
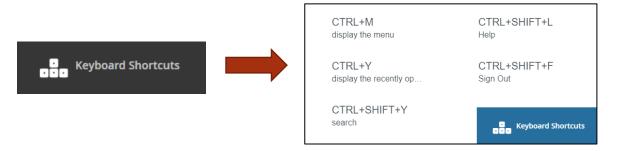

Main Banner Page Link

Click on the *home icon* displayed on the menu to the left of every Banner 9 screen to return to the Main Banner Page.
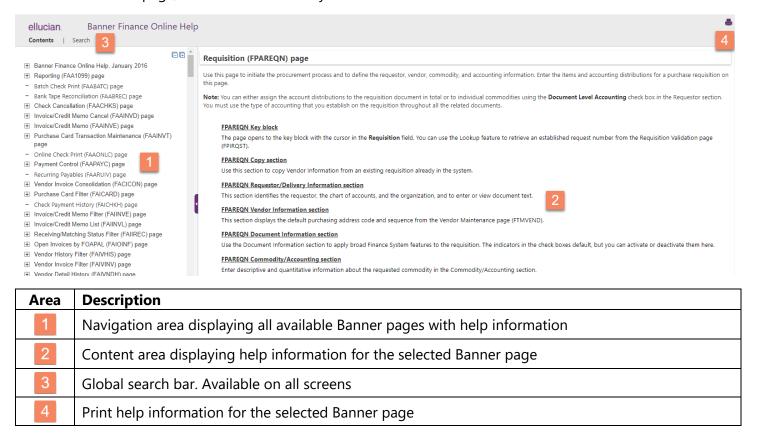

Keyboard Shortcuts

To view the available keyboard shortcuts, click on the *Keyboard Shortcuts* link in the lower right corner of the Main Banner Page.

Help Page

Online help is available on most Banner 9 screens by clicking an active **? button** located at the top right corner. The *Banner General Online Help* page will open in a separate web browser tab and displays the available help information for the page/screen that is currently active.

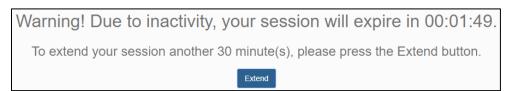| Area	Description
1	Navigation area displaying all available Banner pages with help information
2	Content area displaying help information for the selected Banner page
3	Global search bar. Available on all screens
4	Print help information for the selected Banner page

Banner Log Out

Click the *Sign Out* button located near the top right of the screen to start the logout process. The next screen will display options to a) complete the logout process or b) return to the Banner Home Page in a new session and continue.
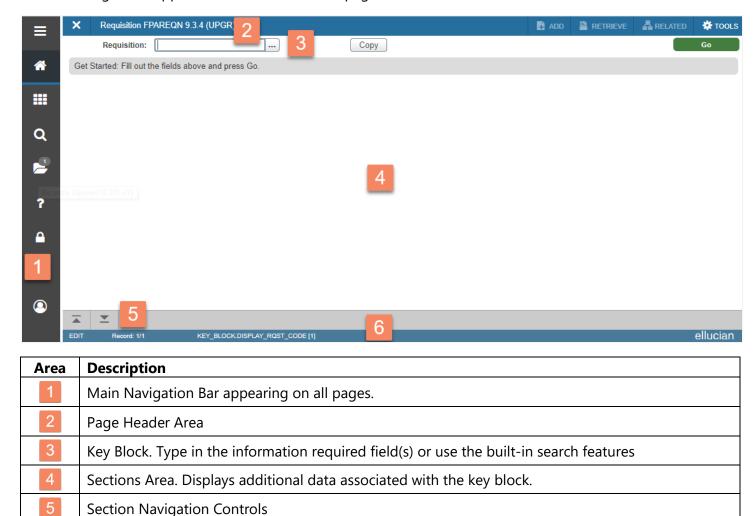

Banner Inactivity Time Out

Banner will also start a process to log out a user due to inactivity. The process will start with a warning message and a timer before logging the user out of the Banner session.

Clicking the *Extend* button will return the user to the Banner Home Page. If the session expires, the user will see the *Banner Log Out* message displayed (see previous section).

Banner 9 Transformed Page

Below is the general appearance when a Banner 9 page is accessed from the menu.

Area	Description
1	Main Navigation Bar appearing on all pages.
2	Page Header Area
3	Key Block. Type in the information required field(s) or use the built-in search features
4	Sections Area. Displays additional data associated with the key block.
5	Section Navigation Controls
6	Additional information on the section or page currently displayed

Page Header Area

This area contains the following information:

- X button – Closes the current page
- Page Description, short name, Banner version, and database name
- *Add* and *Retrieve* button - Banner Workflow and Document Management buttons
- *Related* button – Shows other pages (if available) that can be accessed through the current page
- *Tools* button – A list of other actions that can be performed on this page
- Notification Area – appears at the far right displaying information or error messages, as needed

Key Block

The first block displayed on most pages will be the Key Block. The contents of the Key Block determines what information is entered by the user or displayed on the rest of the page.

The key block can be something as simple as entering an ID number for a person, vendor, requisition, or transaction. In other instances, key blocks may contain multiple parameter fields that require input before the requested information is located and displayed. Note: all required fields will have an asterisk to the right of the field name.
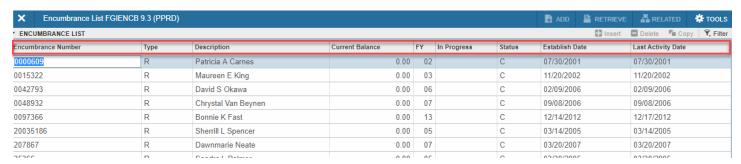
Parameter fields may also include a search (ellipsis) button that displays additional screens to aid in entering the correct information. Also note that parameter fields may be automatically populated based on what is set in other fields previously.

In the below example, let's start by entering the information in the entry field (containing the asterisk) and pressing the green *Go* button (or *Enter* key on the keyboard) on the right side to start the lookup process.
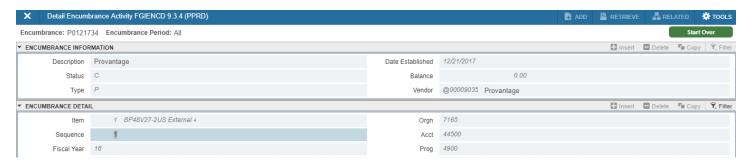

If the required information is not available, click the ellipses button to the right of the entry field to bring up a lookup table.

Note that some searches will require setting up a filter in order to see the search results. Refer to the Filter section appearing later in the user guide for information.
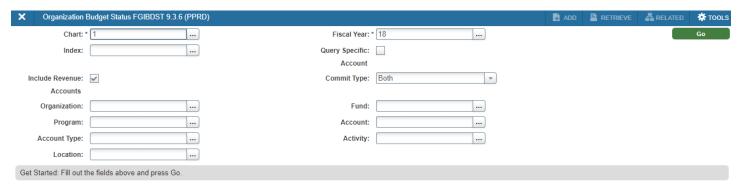

Sorting options are also available. Click on any of the headers (highlighted in red) to enable ascending or descending sort on the data column. Once the desired information is found, double click on the corresponding number in the leftmost column to import back into the entry field in the previous form.

Click the *Go* button to confirm and display the associated information on the page.

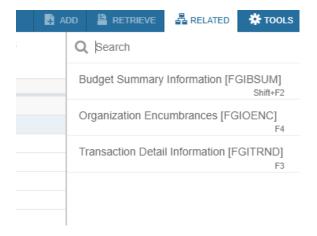Note the key block is located at the top of the information page.

The example below requires setting multiple parameters in order for a search (or targeted search) is performed.

In some cases, setting one parameter may result in others being automatically set as well. Once all necessary parameters are set, click the *Go* button to search for the record and display.

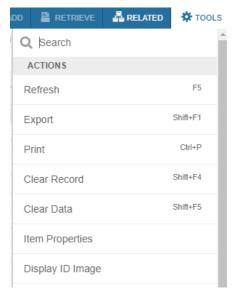## Related Pages

If available, clicking the *Related* button will display a list of other pages that can be directly accessed.
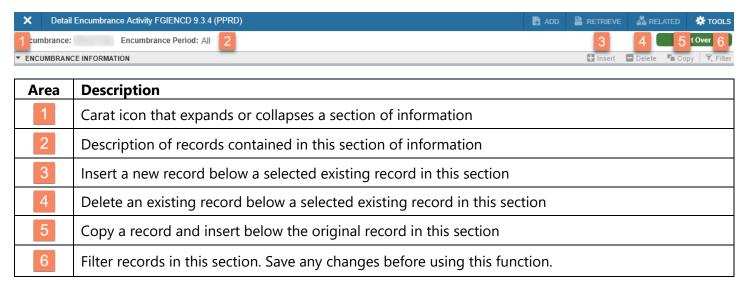

Tools

Click the *Tools* button to display the search bar, export, print, or other available actions and options listed.
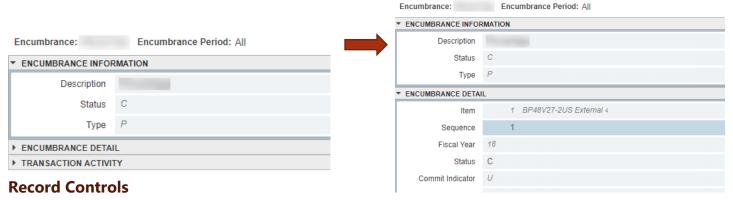
Sections

Each Banner page will contain sections (or blocks) of additional data for the key information. Controls are available to access pages containing multiple records and tabs for multiple sections.

Below is an example of a section header with descriptions. Section headers appear below the key block.

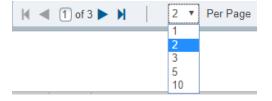| Area	Description
1	Carat icon that expands or collapses a section of information
2	Description of records contained in this section of information
3	Insert a new record below a selected existing record in this section
4	Delete an existing record below a selected existing record in this section
5	Copy a record and insert below the original record in this section
6	Filter records in this section. Save any changes before using this function.

Expand/Collapse Section

Sections can be expanded/collapsed by clicking on the carat symbol located at the bottom left of a section header.
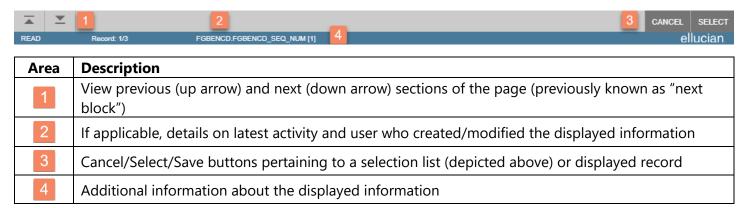

Record Controls

Controls are also available to view each record individually or in multiples by adjust the number of records to display in the section. The control appears at the bottom of the displayed section.

Navigation Controls

Controls are available to navigate sections, perform other functions, and display additional information.

Area	Description
1	View previous (up arrow) and next (down arrow) sections of the page (previously known as "next block")
2	If applicable, details on latest activity and user who created/modified the displayed information
3	Cancel/Select/Save buttons pertaining to a selection list (depicted above) or displayed record
4	Additional information about the displayed information

Filters

If available, a filter feature is available to filter information in the displayed section by following these steps:

1. Click the *Filter* button on the far right of the header for the desired section

2. Click on the *Add Another Field* drop-down box that appears and select a parameter
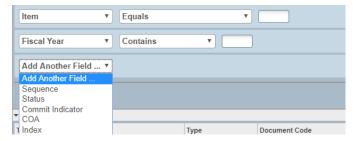

3. The selected parameter will display with settings to choose the operator and value to filter. Be sure to enter a value type that is consistent with the chosen filter field to produce valid results.

To clear a filter field, click the minus icon on the far right of the filter field line.

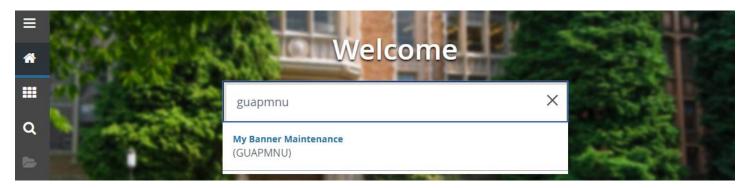4. Repeat Step 2 and 3 to set up additional filter fields, as needed.

5. Click the *Go* button at the bottom right of the filter list to activate the filter and view results. To clear all filters and start over, click the *Clear All* button.
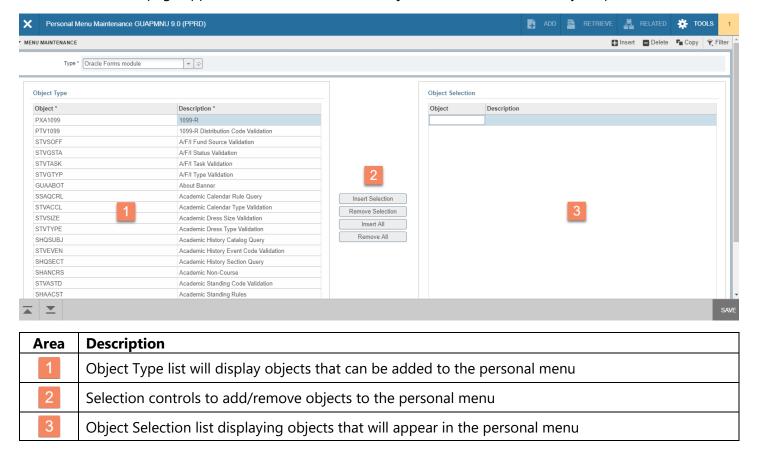
My Banner Personal Menu

The Global Main Menu can be customized by adding a personal menu entry (called My Banner) that contains links to pages, jobs, and menus that are accessed regularly by the user.

To create the personal menu, follow the steps listed below:

1. Type GUAPMNU into either the search field on the main Banner page or the search bar that appears next to the main menu button on the top bar. Click on the GUAPMNU entry that appears in the results list.

2. The GUAPMNU page appears with a list of available objects that can be added to your personal menu.

Area	Description
1	Object Type list will display objects that can be added to the personal menu
2	Selection controls to add/remove objects to the personal menu
3	Object Selection list displaying objects that will appear in the personal menu

3. To add an object to the personal menu, select the object type in the *Type* drop-down menu above the columns, double-click on the desired object name appearing in the *Object Type* list (text will appear in a blue color), click the *Insert Selection* button in the middle section. The selected object will appear in the *Object Selection* list in the right column to confirm.
4. If the desired object is not in the current *Object Type* list, you can search for it by clicking the *Filter* button in the section name bar
5. Select either object or description option, set the operator if necessary, type in the name or description, and click the *Go* button. Find the desired object in the search results list and select. For more information on Filters, refer to the section of the same name appearing earlier in this guide.
6. If an object needs to be removed from the *Object Selection* list, double-click on the desired object (text will appear in a blue color) and click the *Remove Selection* button in the middle column.
7. Repeat Steps 3-7 until all selected objects appear in the *Object Selection* list in the right column
8. Click the *Save* button in the lower right corner to set the personal menu items

Note: If an inaccessible object is added to the *Object Selection* list, click *Tools | Clear Record* to remove the object. The error message will prevent the removal of the inaccessible object normally.

To view the revised Global Main Menu, log out and back into Banner, and click the Main Banner Menu icon to verify the My Banner entry and the desired objects.