# **Banner 9 Introduction**

#### West Valley-Mission CCD - 2018



V1 E Raznick V2 A Travis

## Agenda

- What is Banner 9?
- Changes in Navigation
  - Application Navigator
  - Keyboard Shortcuts
- Demonstration
  - General Person, Job Submission, Job Sub Output Definition
- Testing Banner 9
- Practice
  - Top 3 Forms you use today

#### What is Banner 9?

- Conversion of Banner 8 INB Forms to a modern web interface.
  - Sometimes called Transformed Pages or Transformed Forms.
  - Every baseline Banner 8 form has a Banner 9 equivalent with the same name.
  - Much of CALB has moved to baseline, with some name changes.
- Update of SSB 8.x to modern, responsive web application.
  - WVM will start implementing in 2019.
- Database and Jobs are largely unchanged.
- New Features and Functionality, including extensibility.
  - Most New features of Banner 9 are in self service applications.
- Improved usability and accessibility.

#### Banner 8 – Forms (INB) Banner 9 – Admin Pages

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#### Why Banner 9?

- Oracle will not support forms after Dec 2018.
- Responsive design you can expand and contract the size of the page, similar to other windows.
- Can run in most current web browsers and operating systems, including tablets.
  - No longer dependent on Java plug-in or Internet Explorer.
- Improved Navigation and Search features.
- Shorter learning curve than Banner 8 forms.
- Uses Single Sign On (SSO) for authentication.
- WVM Go-live planned for November 5<sup>th</sup>

### **Banner 9 Timeline**

- Students will not be directly impacted by the Administrative Go-Live planned for November 5.
- All departments and Administrative Banner (INB) users will switch to Banner 9 on the same date.
- We will implement Banner 9 Self Service application starting in 2019 (personal information, registration, time entry, student profile, etc.)

## Terminology and Login Changes

#### Banner 8

- Forms
- Blocks
- Next Block
- Rollback
- Query
- Login with Oracle account
- Home screen/Banner Menu

#### Banner 9

- Pages
- Sections
- Go
- Start Over
- Filter
- Single Sign-On
- Application Navigator

### **Common Keyboard Shortcut Changes**

Action	Banner 8	Banner 9
Next Block / Go or Next Section	CTRL+Page Down	ALT+Page Down
Previous Block / Previous Section	CTRL+Page Up	ALT+Page Up
Rollback / Start Over	SHIFT+F7	F5
Select Record	SHIFT+F3	ALT+S
Access Menu		CTRL+M
Access Help		CTRL+SHIFT+L
Recently Opened		CTRL+Y

Full list available on the Banner 9 Portal Site

## **Application Navigator**

#### Provides the Banner 9

- Landing Page
- Menu
- Search
- Help



#### **Application Navigator**



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## AppNav with Admin Page

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#### **Banner 9 Short Term Exceptions**

Just for the student team:

We will continue to have a small number of key forms that remain Banner 8 INB due to CALB compatibility:

- SOATERM
- SFAREGS
- SSASECT
- SSAACCL
- SSAACRL

These forms will be replaced with Banner Pages in the near future.

### AppNav with Banner 8 Form

#### Only works in Internet Explorer!

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### AppNav with Banner 8 Form

May see extra security warnings you must Allow.



## AppNav with Banner 8 Form

This error appears when you try to open a Banner 8 form in AppNav and NOT using Internet Explorer.



#### Banner 9 Demo

# Pages: General Person, Job Submission, Job Sub Output Definition

Key Navigation Topics:

- Help and Item Properties
- Filter
- Related and Options Menus
- New JobSub features
- Export

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#### **Banner Student Online Help** ellucian

Contents | Search

#### General Person Identification (SPAIDEN) page

- Banner Student Online Help, August 2016
- Admissions Application/Checklist Summary (SAAACKL) page
- Admissions Application (SAAADMS) page
- Application User Defined Flags/Fields (SAAAUDF) page
- Admissions Checklist Rules (SAACHKB) page
- Admissions Decision and Rating Batch Entry (SAADCBT) page
- Admissions Decision (SAADCRV) page
- Admissions Decision Rules (SAADCSN) page
- Electronic Admissions Procedure/Routine Control (SAAECRL) page
- EDI Cross-Reference Term Code Rules (SAAECTM) page
- page
- Electronic Application Submitted (SAAETBL) page
- Quick Entry Rules (SAAQKER) page
- Application Questions/Answers (SAAQUAN) page
- Quick Entry (SAAQUIK) page

- Admissions Rating Formula Definition (SAARRDF) page

- Web Admissions Term Calendar Rules (SAAWAAD)

Use the General Person Identification page to capture biographic/demographic information for all persons/non-persons associated with the institution.

Persons/non-persons may belong to any or all of the installed applications (Banner Student, Banner Finance, etc.). All persons/non-persons are first entered into the database using this page. The information maintained in this page is specific to the person/non-person and does not relate to the person's/non-person's involvement at the institution. All other modules/applications are dependent on the information captured and maintained in this page. Any changes or additions to a person's/non-person's biographic/demographic information must be made in this page.

You can access the Common Matching Entry (GOAMTCH) page from SPAIDEN to enter information for a new ID and then execute the matching process before a new PIDM is created in Banner®. To do this, turn on Common Matching for the institution using the OnlineMatching Process Enabled (Indicator) on GUAINST. In addition, the user attempting to access GOAMTCH must not have been excluded from using it on GORCMUS. If user has been excluded from Common Matching on GORCMUS, he/she can access GOAMTCH from the Banner menu system.

To open GOAMTCH from SPAIDEN: enter GENERATED in the ID field, select the Generate ID button, or enter an ID in the ID field that does not exist in Banner. The GOAMTCH page will automatically be displayed. If a person record is created using only the GOAMTCH page, the Origin field (on SPAIDEN and SPRIDEN) will be set to GOAMTCH. If the person record is created using SRRSRIN or SRIPREL, then the Origin field will be set to SRKPREL.

You can search on person last and first names and non-person names by text to see if similar names exist. Use the Search feature from the LastName and First Name fields to view similar names on the Person Search (SOAIDEN) page. Use the Search feature from the Non-Person Name Information Name field to view similar names on the Non-Person Search (SOACOMP) page.

You can view the user ID and the page or process which created that name/ID record in the ID and Name Source section.

#### Main window

The main window contains the key block and the Current Identification section.

#### Alternate Identification window

Use this window to enter or change information for an alternate ID and name.

#### Address Information window

Use this window to enter address and delivery information for the person.

#### Telephone window

This window displays information from the main section of SPATELE. You can view and update telephone records in this window.

#### **Biographical window**

This window displays information from the main section of SPAPERS. You can view and update person records in this window.

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#### **Banner 9 Testing Strategies**

- If you have a written test plan, you can use that to guide all pages and processes that must be tested.
- If you have procedure documentation or job aids, use those.
- Parallel processing: for everything you do in Banner 8 Production, try it in Banner 9 Test as well.
- Unit Testing vs Lifecycle Testing
- Think about occasional processes and try to ensure all key processes that occur with a year are covered.
- If something doesn't look right, test it in Banner 8 to compare results.

#### **Banner 9 Practice**

- WVM Banner resources: <u>https://wvmccd.sharepoint.com/sites/Banner9/SitePages/Banne</u> <u>r-9-Portal-Site.aspx</u>
  - Includes link to Test Banner 9 Instance
- Can use any web browser, but Firefox and Chrome perform best.
  - Must use IE if you need to access any Banner 8 forms (SOATERM, SFAREGS, SSASECT, SSAACCL, SSAACRL)
- If problems, clear cache and restart browser, and/or use Private Browsing/Incognito.

### Banner 9 Login

#### Logging in to Banner 9 is different !

You will use your WVM email account (really Active Directory or "AD")

West Valley Employees: <u>Firstname.lastname@westvalley.edu</u>

Mission Employees: <u>Firstname.lastname@missioncollege.edu</u>

District Employees: Firstname.lastname@wvm.edu

Part Time Faculty, and Short Term Employees of all e-classes: <u>firstname.lastname@wvm.edu</u>

Password: Same as when logging in to computer or webmail



#### **Banner 9 Practice**

- Pick 3 to 5 forms you commonly use and test each Banner 9 page.
- Try to ensure you look at complex pages, single record vs multiple record pages, rule and control pages, grid layout, inquiry pages, validation pages, and run a Job Sub process.

• Questions?

#### Banner 9 Summary

- WVM Banner 9 Portal: <u>https://wvmccd.sharepoint.com/sites/Banner9/SitePages/Banne</u> <u>r-9-Portal-Site.aspx</u>
  - Includes link to Test Banner 9 Instance and Banner 9 Reference handout.
- WVM Go-live planned for November 5<sup>th</sup>
- Self Service implementation starts in 2019.