Exploring Banner 9

Upgrade Overview
Application Navigator
Administrative Pages

Module 3 – Administrative Pages
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What we will cover:

- Anatomy of a Page
- Record Controls
- Related Pages Menu
- Tools Menu
- Page Layout Options
- Notification Center and Online Help
- Pages With Columnar Data
- Drill to Detail
- Export to Excel
Anatomy of a Page – Part 1

While the look of a page is different than its Banner 8 counterpart, much of the layout, icons, buttons and functionality remain the same.

Page Operation

1. When the page initially opens, only the keyblock information is visible. For this form, there is a single keyblock field: ID. As with Banner 8, you can click the lookup button (...) to lookup and select a value for ID.

2. After entering the required information in the keyblock, click
New Lookup Options

1. Click on the **Lookup Button ( ... )** located to the right of the **ID** field in the Keyblock.

2. As with Banner 8, you have the option of doing a Person, Non-Person, and Alternate ID Search. Click on **Person Search**. The **Person Search (SOAIDEN)** page is presented.

3. Click the **Add Another Field** button.

4. Choose **Last Name** from the list of fields to search. Note that you can choose any combination of the 6 different fields to include in your search.

5. Choose **Starts With** from the list of operators. Note that you can choose from 6 different operators.

6. Type **Your Last Name** in the search field. Note that you can continue to add additional fields in the search.

7. Click the **Add Another Field** button once again and choose **First Name** from the list of fields.

8. Type **Your First Name** in the search field.

9. Notice that you can make your search case-sensitive or case-insensitive.

10. Click the **Go** button to retrieve a list of matching records.

11. **Select** the desired record by double clicking it or use the **Select** button at the bottom of the page.
Anatomy of a Page – Part 2

Upon activating the page after clicking GO, note that the keyblock collapses, but the information is still viewable. Note also that the green Go button changes from GO to Start Over. You can click Start Over to clear the page and return to the keyblock.

Page Tabs

Many Banner 9 Pages use tabs to organize data. The SPAIDEN form has 8 tabs. Note that the first tab, Current Identification is highlighted, indicating where you are in the page.

1. Click on the Address tab to see addresses (notice calendar lookup for date fields).
2. Click on the Telephone tab to see telephone numbers (notice … next to fields supported by lookup).
3. Click on the Current Identification tab to navigate back.

Page Sections (formerly Blocks)

Banner 9 Administrative Pages use “sections” to separate information on a page. These sections can be collapsed or expanded one at a time to save real estate.

1. Click on the down arrow next to PERSON to collapse that section.
2. Click on the down arrow next to ID AND NAME SOURCE to collapse that section.
3. Click on both arrows again to expand both sections.
4. Use the Previous Section (ALT + PgUp) and Next Section (ALT + PgDn) icons in the lower left hand corner to navigate between sections or tabs.
5. Use the Record Functions within each section to insert, delete, copy, and filter records.
Record Controls

1. Click on the E-mail tab to navigate to the person’s email addresses. Note that there are three email addresses for this person.

2. Use the record controls to navigate to First, Previous, Next or Last page of records.

3. Change the number of records to display per page. Note that once changed, the new number of records per page will persist for this section until you change it again. The setting will persist even between sessions.

4. Click the Current Identification tab to return to the first section of the SPAIDEN page.
Related Pages Menu

1. Click on the RELATED Icon to expand a list of pages that are associated with the data displayed on the current page. This menu acts like a toggle. Click the icon once to open, and again to close.

2. You can use the search field at the top of the list to navigate to a specific page.

3. Click on one of the pages in the list to navigate to it.

4. Click the Recently Opened icon in the Main Menu Panel to navigate back to the General Person Identification page. Alternatively, you can click on the X to exit from the related page and return to the page from which you called the related page.
Tools Menu

The TOOLS menu in Banner 9 is roughly equivalent to the Options menu in Banner 8. This menu provides access to standard options, actions, and Banner Document Management based on the current page. We will explore the features of the TOOLS menu in greater detail shortly.
Page Layout Options

1. Scroll to the bottom of the TOOLS menu. There you will notice two selections for page layout: **Expanded** and **Compact**. The default is Compact layout.

2. Click **Expanded**. Note how the page is now magnified and consumes more real estate.

3. Click the TOOLS menu again, scroll to the bottom, and click **Compact** to return to the default layout.

Note: The page layout that you choose will persist as you navigate from page to page.
Notification Center

The Notification Center displays only where there are one or more alerts or messages. The Banner 9 notification is much more prominent in the upper right corner, than the Banner 8 counterpart which was located in the status bar at the bottom of each Banner 8 form. Moreover, alerts are color coded:

- Green – Informational Only
- Yellow – Warning
- Red – Fatal Error (needing corrective action)

1. Without making any changes to any data on the page, click the SAVE button in the lower right corner of the screen. The green alert “No changes to save” appears.

2. Click on the number above the notification to hide the message.
Online Help

Online help is available from within any page and contains detailed instructions and/or step by step instructions. Online help is context sensitive based on where you are in the system.

Click the ? Online Help icon in the Main Menu Panel, or press Ctrl + Shift + L. Online Help is displayed in a separate window so that you can toggle between the Banner 9 page and the help screen.
Online Help

1. Use the **Search** feature in the upper right hand corner of the Online Help page to search within Online Help text.

2. Click the **PRINTER** icon in the upper right hand corner of the Online Help page to print.

3. Use the Navigation Panel on the left to navigate to Online Help for other pages or other sections of the current page.
Pages with Columnar Data

1. Navigate to the FAIINV page and view a list of all CANCELED Invoices.
2. Notice the total number of records is now immediately available in the lower right hand corner of the page, without having to scroll to the bottom of the list.
3. Drag the Invoice Total column next to Vendor Name. You can reorder columns to your liking.
4. Click on the Vendor Name column header to sort the list in ascending order.
5. Click on the Vendor Name column header again, to reverse the sort order.

NOTE: Operations on columns (such as column reordering and sorting) are NOT persistent. Changes are only in effect until you exit the page.
Drill to Detail

1. Navigate to the **FGIBDST (Budget Status)** page and enter at least the required Keyblock information and click **Go**.

2. Locate and click on a specific Account for which you would like to view **Transaction Detail (FGITRND)** information.

3. With the desired Account highlighted, Click the **Related** menu and choose **FGITRND** from the list.
Drill to Detail

1. Notice that the FGITRND form presents itself showing all transactions for the selected Account Code.

2. Note the heavier column separator down the middle. You can move, sort, and filter column information, however columns may not be moved from one side to the other. Columns may only be moved within their respective sides of the page.

3. Highlight a particular transaction by Clicking on it.

4. With the desired transaction highlighted, Click the Related menu icon and choose Query Document (BY TYPE) from the list.

5. The appropriate detail page associated with whichever document type you highlighted appears. Note that the document number is automatically entered into the Keyblock. Click Go to view the document detail.

6. Click Cancel in the lower right hand corner to return back to the FGITRND page.

7. Click Cancel in the lower right hand corner to return from the FGITRND page to the FGIBDST page.
You can export most any page of columnar data to excel. If the page does not support export, you will receive an error message: *ERROR* Function Export Disabled.

1. Filter your records to be exported using record control functions.
2. Click **Tools** and then select **Export** from the dropdown menu or press **Shift + F1**.
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Discussion

Open Lab