Banner 9 Navigation

Purpose
Banner is Purdue’s centralized Student Information System. It contains the academic record for all Purdue students and supports multiple campus functions including: Admissions, Financial Aid, Registration, Transcripts, and Student Billing. Ellucian, the software vendor for Banner, has replaced the current form-based platform with a modern web-based platform. As a result, Purdue, along with every other Banner institution is transitioning to the new Banner 9 system.

Who should use this Document
Core Enrollment Management Offices
Graduate School
Advising Community
ITaP

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Login

1. Go to https://myPurdue.purdue.edu
2. Login using your Purdue career account and password.
3. Click the Banner link to highlight.
4. Click on Banner INB under Banner and Other Applications.

Landing Page

There are 10 areas within the landing page that can be used to navigate within Banner 9.

<table>
<thead>
<tr>
<th>Area</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Menu Icon</td>
<td>![menu_icon]</td>
<td>The Toggle Menu icon is located in the upper left corner of the application. Click on this icon to display or close icon descriptions.</td>
</tr>
<tr>
<td>2 Dashboard/Home</td>
<td>![home_icon]</td>
<td>Returns user to landing page.</td>
</tr>
<tr>
<td>3 Applications</td>
<td>![apps_icon]</td>
<td>Opens Banner and My Banner menus (if previously used in Banner 8). Find the page you are interested in opening, select the desired entry and press Enter.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>
| 4 | Search Icon | ![Search Icon](image)  
Click on this icon to open the Search window. You can then enter the descriptive name of the page or the Banner acronym for the page. |
| 5 | Recently Opened Icon | ![Recently Opened Icon](image)  
The Recently Opened icon displays a current count of pages opened during the logged in session. Click the icon for the list and select a page to re-access it. |
| 6 | Help | ![Help Icon](image)  
By selecting this icon help information will be displayed about the page you are currently viewing. |
| 7 | Sign Out | ![Sign Out Icon](image)  
Use the Sign Out link in the upper right corner when closing the application instead of just closing your browser. |
| 8 | Banner Username | ![Banner Username Icon](image)  
Displays the Banner username of the person logged into the session. |
| 9 | Search… | ![Search Field](image)  
Users can begin typing a page name or partial name and a list will appear of available pages. |
| 10 | Keyboard Shortcuts | ![Keyboard Shortcuts Icon](image)  
Application Navigator page has a set of keyboard shortcuts, which you can review by clicking on Keyboard Shortcuts in the bottom right corner of the main page. |
Page Navigation

The basic navigation of each page includes the Page Header, Notification Center, Key Block, Sections and Buttons.

Page Header

The page header is part of the basic navigation and contains the following items:

<table>
<thead>
<tr>
<th>Task</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Close Icon</td>
<td>![close_icon]</td>
<td>Closes your current page &amp; returns you to the landing page</td>
</tr>
<tr>
<td>Page Title</td>
<td>![course_summary_icon]</td>
<td>Description of Page, Acronym, page, and database versions</td>
</tr>
<tr>
<td>Add Icon</td>
<td>![add_icon]</td>
<td>Used for adding Extender documentation</td>
</tr>
<tr>
<td>Retrieve Icon</td>
<td>![retrieve_icon]</td>
<td>Used to retrieve Extender documentation</td>
</tr>
<tr>
<td>Related Menu</td>
<td>![related_icon]</td>
<td>Used to display a list of pages that are related to the current page and may be accessed from this page</td>
</tr>
<tr>
<td>Tools Menu</td>
<td>![tools_icon]</td>
<td>Tools Menu includes Options and Actions including Refresh, Export, Print, Clear Record, Clear Data, Item Properties, Display Id Image, Exit, Quickflows and other options controlled by the page</td>
</tr>
</tbody>
</table>

Notification Center

The Notification Center message will appear under the page header on the right of the form. This feature replaces the Hint line in Banner 8.
The notification center displays only when there are one or more alerts, as indicated by the number. You can click in the box to close the alert message.

There are four alert levels that display the following types of information:

- **Green**: Successful save of data
- **Yellow**: Warning messages
- **Red**: Error messages
- **Blue**: Informational messages

**Key Block**

Like Banner 8, the first block on most pages contains key information. The key block determines what data is entered or displayed on the rest of the page. The key block will remain on the page as subsequent sections are displayed.

Key blocks can vary based on the form being used. In this example we are using SHACRSE.

1. The **Go** button to advance to the body of the page, formerly **Next Block**.

**Searching ID’s in the Key Block**

Many forms open with the ID field in the Key Block. There are three ways to search for ID’s within Banner.
1. **ID Field Entry**  
   A. Enter the **ID** in the ID field  
   B. Verify the student name appears in the box to the right  
   C. Click **Go**

2. **Name Entry**  
   A. Click inside the blank **ID** field  
   B. Click **Tab**  
      **NOTE:** An empty field will appear to the right or below the ID field  
   C. Type the **Last Name, First Name**  
      **NOTE:** It is important to use this format  
   D. Press **Enter**  
      **NOTE:** Do not click the Go button  
   E. The ID will appear in the ID field, or a list of possible names will open for selection

3. **Lookup | Search**  
   A. Select the **Lookup** button next to the **ID** field.  
      **NOTE:** An Options List will open  
   B. Select **Person Search**  
   C. Use the **Add Another Field** to select fields available for search  
      **NOTE:** Add as many as needed  
   D. Select **Go**  
   E. Select the appropriate **row**  
   F. Click **Select**  
   G. Click **Filter** to re-open values and add additional search criteria as needed

### Page Navigation Buttons

<table>
<thead>
<tr>
<th>Navigation Buttons</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go</td>
<td>Next Block</td>
<td>Use the Go button to advance to the body of the page after populating the key block.</td>
</tr>
<tr>
<td>Save</td>
<td></td>
<td>Use the save button to save changes on the page. The Save button is located on the bottom right side of the page.</td>
</tr>
<tr>
<td>Section Navigation</td>
<td>Next Block</td>
<td>Use the Next Section (arrow down) button to navigate to the next section of data. Use the Previous Section button (arrow up) to navigate to the previous section. Button are located at the bottom left of each page. <em>(Previously known as Next Block).</em></td>
</tr>
<tr>
<td>Start Over</td>
<td>Rollback</td>
<td>Use the Start Over button to return to the key block of the page.</td>
</tr>
</tbody>
</table>
Sections (formerly Blocks)

Some pages are divided into sections that contain additional details for the key information. A section can represent one record or multiple records depending on the type of information presented. Each section contains related information.

In this example, SSASET has many sections related to the CRN for the term.

If available, the individual sections have a header that includes icons for Insert, Delete, Copy, Filter, and More Information (formerly Supplemental Data in Banner 8).

<table>
<thead>
<tr>
<th>Task</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sections default to open</td>
<td></td>
<td>Open/Close section</td>
</tr>
<tr>
<td>Insert</td>
<td></td>
<td>Insert records within the section</td>
</tr>
<tr>
<td>Delete</td>
<td></td>
<td>Delete records within the section</td>
</tr>
<tr>
<td>Copy</td>
<td></td>
<td>Copy records in the section</td>
</tr>
</tbody>
</table>
### Basic Navigation

#### Required Fields

If an asterisk (*) is displayed next to a field name, the field requires a value to continue through the page. Users will receive a message requiring additional action if needed. In the example below, creating a new section of a course requires Subject, Course Number, Section, Campus, etc.

Users will receive a message requiring additional information if no values are added.
Sort Order
In a spreadsheet or grid layout, the values on fields can be sorted. The image below indicates the data is currently sorted descending by Term.

1. Click the arrow in the header cell to reverse the order to ascending
2. Click another field to sort on that column
   NOTE: Only one column can be sorted at a time

Dates
1. Dates can be entered manually into the cell in mm/dd/yyyy format
2. Dates can also be selected using the calendar icon. Use the arrows to select the month, day, and year.
3. Current date may be added by typing any alpha chracter in the box, press Enter/Return. The current date will be loaded
Lookup

The Lookup feature allows you to quickly look up a value for a field. The **Lookup** button next to a field indicates that the field has the Lookup feature.

1. Click the **Lookup** button
2. Enter a **filter** value
3. Press **Enter** to display results that match the filter criteria.
4. Select a **value** and click **OK**, or double-click a value to return the value to the calling page.

Item Properties

Item properties lists all properties for the field where the cursor is currently located. Item properties include the field’s internal database name, whether it is required, type of data (character or numeric), maximum length and other characteristics of the field. The specific properties that are displayed depend on the type of field.

(Replaces **Dynamic Help** query option in Banner 8).

To display item properties for a field, follow these steps:

1. Place the cursor in the field and select **Tools**
2. Select **Item Properties** to view the information
Filtering Data in Sections (Formerly Query)
Filtering within a page section allows users to drill down to specific data.

1. Click the Filter icon in the applicable section

2. Use the Add Another Field drop down to add the column needed for the search

   Example: Select Subject

   NOTE: A query line appears with the Subject field

3. Add a Subject code

   Example: ENGL

4. Users have the ability to use additional fields to filter further down into the data by selecting Add Another Field multiple times

5. Click Go
6. The data will be returned

   **Note:** Users can return to the filter options by selecting **Filter Again** or select the x to remove the filter window.

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Data Export

Users can export data from a Banner page to an Excel spreadsheet (.xls).

1. Click **Tools**
2. Click **Export**
3. A pane will open at the bottom of the screen confirming the data was exported and downloaded.
4. Select **Open** to view the spreadsheet in Excel. Users can **Save** the file as well.
Viewing Single Record/Multiple Record Toggle

Data can exist in multiple records of the same type in the database. The Banner screen defaults to displaying multiple records. By toggling the view, users can move from record to record using pagination controls, located in the bottom left had corner for both display types. This feature is only available when the toggle icons are displayed.

1. For example Term Code Validation (STVTERM) can be stored in a grid view and may require horizontal scrolling to review all of the detail.

2. Term 999999 is currently highlighted. Additional information is displayed at the bottom of the page for the 999999 record.

3. By selecting the toggle icon, data can be displayed one record at a time. This allows all the column details pertaining to 999999 to be displayed within the page without scrolling.

4. Total record counts are located at the bottom of the page for both views.
5. Navigating the pages will vary depending on the amount of data and rows being stored in the database. Users can navigate in both display modes to help search through the data.

- **Click** the **outside arrows** to move to the first page (if the arrow is pointing to the left) or last page (if the arrow is pointing to the right).
- **Click** the **inside arrows** to move to the previous (if you click the arrow pointing to the left) or the next page (if you click the arrow pointing to the right).
- **Click** the **drop down arrow** to change the number of **records displayed** per page.
- Changing the number of records per page will only affect the page you are currently using and it will not remember the setting when you leave the page.
- The **default properties** will always override changes once the page is closed.

**Ordering and Rearranging Columns**

When viewing data in grid format, users can re-arrange columns to meet their needs.

1. **Click** the **column** to move and drag it to the desired position

   Example: **Subject** was moved to the first column, previously residing after the **CRN** column

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**My Banner**

**Display**

My Banner can be found within the applications icon and can be used to display your favorite or most commonly used pages.
Add or Edit My Banner Menu

To add or edit pages, follow these steps:

1. Type My Banner or GUAPMNU into the search field of the Banner landing page
2. There are two ways to add items to My Banner
   A. Enter Code
      a. Enter the **seven-character code** directly into the *Object Field* in the table on the right
      b. Press the **Tab Key**
      c. The *Form Description* will display and you can **edit** the description to something more meaningful
d. Use the **Insert** icon to add additional form names

**NOTE:** When using this option, you can control where new inserted rows appear in the list. Click on an existing row and select **Insert**, a blank row will appear below the selected value.

e. When finished adding items, **Save** your changes.

B. **Select Type**

a. **Scroll** through the list of forms located in the table on the left. Use the drop down arrow to select the **Type** of object you are looking for using one of the items in the list:

- **Oracle Form Module**: Default display that identifies the Banner page names
- **Job Submission Object**: Displays job forms

**NOTE:** It is important to click the **Refresh** icon next to the drop down to update the list after your selection.

b. **Click** on the **Object** block to sort the objects

**NOTE:** When using this option, you can control where new inserted rows appear. Click on an existing value in the right pane and select **Insert**, a new blank row will appear below the selected value.

c. **Highlight** the selected row by double clicking on the **Object name**

**NOTE:** Object name will highlight in blue and the description name text will turn dark blue

d. The object will insert into at the bottom of the list on the right side of the page

e. When finished, **Save** your changes.

**NOTE:** You must have your cursor clicked on an item in the **Object Selection pane**, on the right side of the page, for the changes to save

Users will not see the new **My Banner** menu or changes until the next login.
Using MyBanner FAQ

- Objects created in Banner 8 will migrate over to Banner 9.
- When using GUAPMNU, you can rename objects making them unique to the My Banner setup. This does not rename the objects in Banner.
- Objects will usually be located in the Oracle Forms module under Type.
- Items can be removed one by one using Delete, Remove Selection, or delete all by using Remove All.
- It is highly recommended users add the GUAPMNU page to their menus as a reminder of the form used to make changes to My Banner.