

# Banner 9 Admin Pages– Getting Started

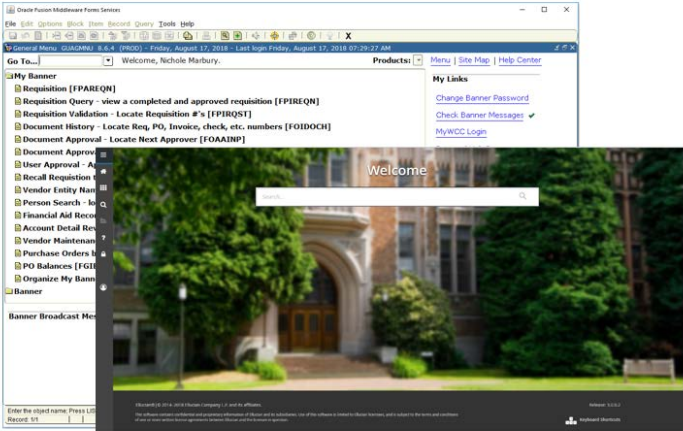
## 1. Introduction

### Welcome to Banner 9!

The following instructions have been provided to assist you with navigating the new features and functionality within Banner 9.

Although the interface has a new look and feel, the inner workings of the core system, business process and procedures stay the same.

This guide will highlight the changes which includes: terminology, keyboard shortcuts, and overall basic navigation.

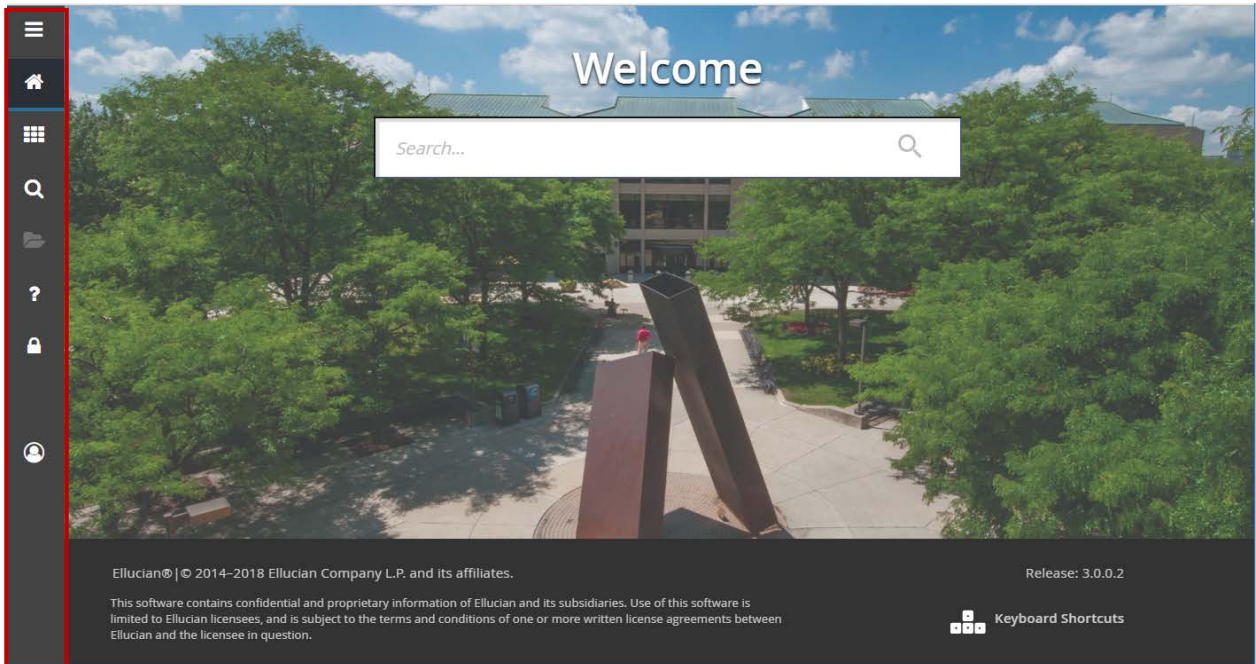


Key Terminology Changes	
Forms	Pages
Blocks	Sections
Next Block	Go Button
Next Block (Sections)	Previous Section / Next Section
Options	Related
Query	Filter
Rollback	Start Over
Record Remove	Delete

Shortcut Key Changes			
Banner 8	Shortcut	Banner 9	Shortcut
Next Block	Ctrl+PgDn	Next Section	Alt+PgDn
Prev Block	Ctrl+PgUp	Previ Section	Alt+PgUp
Rollback	Shift +F7	Start Over	F5

## 2. Application Navigator (Landing Page)

- **Menu:** is a group of three horizontal lines at the top left of the page. Clicking this



button will expand the menu to display the names of the Application Navigator Icons. Click the Menu icon or the Back to Main Menu link to display the main menu on any screen.

- **Dashboard:** Indicated by a home icon. From any screen, click this button to return to the landing page.
- **Applications:** Small 3x3 grid of small boxes. Used to display the Banner Menus (including your personal menu)
- **Search:** Indicated by a magnifying glass, can be used to find pages using key words or by using the 7 letter acronym Ex. (SPAIDEN)
- **Recently Opened:** indicated by a file folder. Displays a list of recently opened pages.
- **Help:** Indicated by a question mark, displays the online help for Banner 9 administrative applications. To use help, you must access the page first.
- **Sign Out:** Indicated by a lock
- **Search Field:** Used to search for pages, jobs, menus, and quick flows

**Note:** To ensure that you are logged out, it is important to remember to use the Sign Out link when closing the application instead of just closing your browser.

# 3. Basic Navigation

The basic navigation of each page includes the **page header**, **notification center**, **key block**, **sections**, and **buttons**.



## 1. Page Header

- **Page close icon**
- **Page title**
- **Add and Retrieve icons**, which are used with Xtender
- **Related Menu**, which displays a list of pages that can be accessed from this page.
- **Tools Menu**, which includes refresh, export, print, clear record, clear data, and other options.

**Notification Center**, is located to the right of the Tools menu and displays the following types of information as needed:

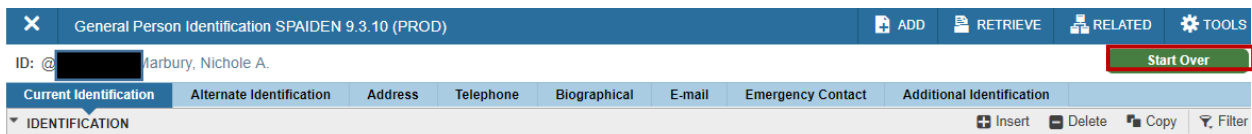
- **Successful** save of data
- **Warning** Messages
- **Error** Messages
- **Informational** Messages

**Note:** The notification center only appears when a message is displayed. You can click in the box with the number in the page header to open or close the Notification Center.

## 2. Key Block



- a. The first block on most pages
- b. The **key block** determines the data displayed on the rest of the page, it also stays on the page as the sections are displayed.
- c. To access the information from the key block:
  - i. Populate the key block and then click **Go** (next block in Banner 8).
  - ii. To return to the key block, click the **Start Over** button (known as rollback in Banner 8).



## Sections

The screenshot displays a web application interface with a top navigation bar containing tabs: Current Identification, Alternate Identification, Address, Telephone, Biographical, E-mail, Emergency Contact, and Additional Identification. Below this is a main form area with four sections: IDENTIFICATION, PERSON, NON-PERSON, and ID AND NAME SOURCE. Each section has a header with expand/collapse arrows and icons for Insert, Delete, Copy, and Filter. The PERSON section is expanded, showing fields for Last Name (Marbury), First Name (Nichole), Middle Name (A), Prefix, Suffix, Preferred First Name, and Full Legal Name. The bottom status bar shows Activity Date 11/29/2010 03:29:58 PM, Activity User CDANIELS, and a SAVE button.

3. Pages are divided into sections that contain information from the key block.
  - a. Sections of data are accessed by clicking the next section buttons (located in lower left of page) and or by clicking the Tabs across the top. They can also be opened or collapsed by clicking on the arrow on the far left side of the section header.
  - b. If available, the sections have headers that includes icons for the following actions: The following actions are only available (indicated by bold headings) when the cursor is in a field in that particular section.
    - i. **Insert.** Use this to insert records in the section.
    - ii. **Delete.** Use this to delete records in the section.
    - iii. **Copy.** Use this to copy records in the section.
    - iv. **Filter.** Use this to filter records in the section

## Required Fields

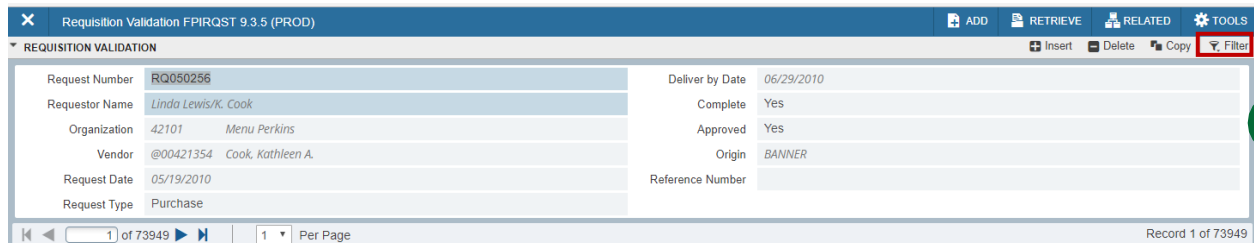
- An asterisk (\*) displayed next to a field name indicates that the field requires a value before you continue on the page.
- If you to leave a section or a page without entering information in a required field, the page notifies the individual in the Notification Center, requiring the user to perform some additional action.

The screenshot shows a form with the following fields: Requestor \* (Nichole Marbury), Organization \* (empty), COA \* (1), and Email (empty). The asterisk (\*) indicates that these fields are required.

## 4. Filtering

Not only can you search for information using query pages (Ex, SOAIDEN), you can also, search for information by using the **filter** option (if active and available) in each section of a page.

Once filter is selected, the basic filter page is displayed. You can then perform your search from default fields, or select additional fields by clicking the **Add Another Field** drop down. You can also open up the **Advanced Filter** to search for information using specific operators. To remove search fields, click the minus button.

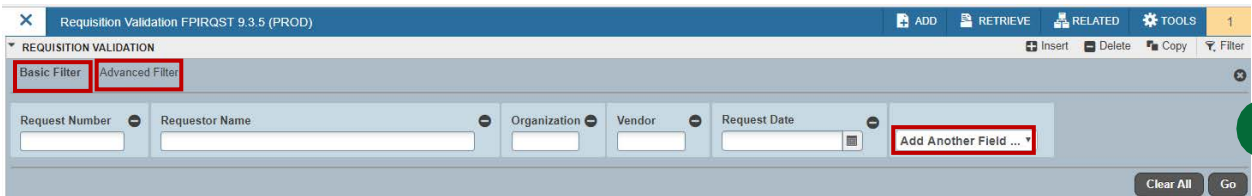


Requisition Validation FPIRQST 9.3.5 (PROD)

REQUISITION VALIDATION

Request Number	RQ050256	Deliver by Date	06/29/2010
Requestor Name	Linda Lewis/K. Cook	Complete	Yes
Organization	42101 Menu Perkins	Approved	Yes
Vendor	@00421354 Cook, Kathleen A.	Origin	BANNER
Request Date	05/19/2010	Reference Number	
Request Type	Purchase		

1



Requisition Validation FPIRQST 9.3.5 (PROD)

REQUISITION VALIDATION

Basic Filter Advanced Filter


Request Number Requestor Name Organization Vendor Request Date Add Another Field ...

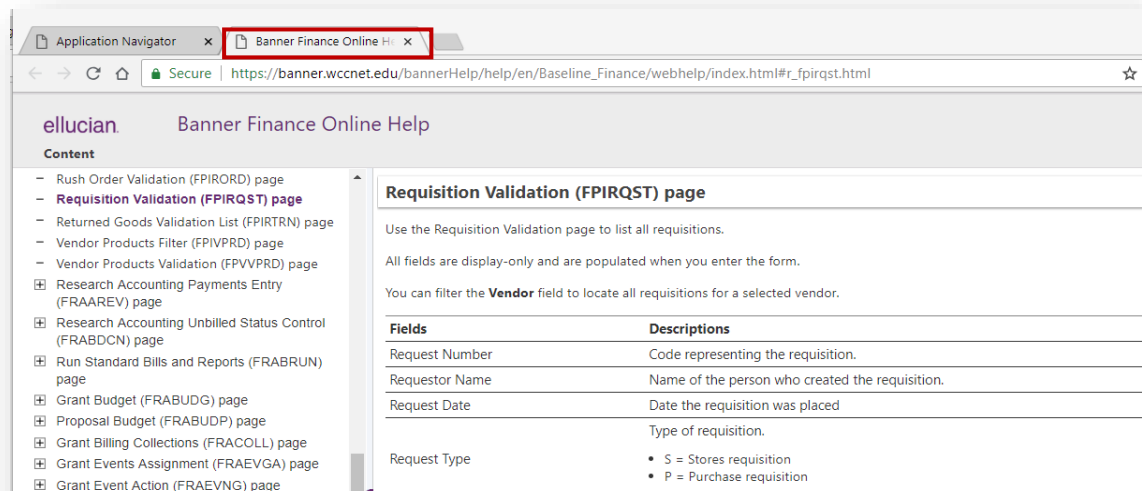
Clear All Go

2

## 5. Help

An online help manual is available!

1. To access the online help manual regarding a particular page, make sure you are on that page.
2. Click on the question mark on the menu bar . The help page will open up in a new tab



Application Navigator x Banner Finance Online Help x

Secure | https://banner.wccnet.edu/bannerHelp/help/en/Baseline\_Finance/webhelp/index.html#r\_fpirqst.html

ellucian Banner Finance Online Help

Content

- Rush Order Validation (FPIORD) page
- **Requisition Validation (FPIRQST) page**
- Returned Goods Validation List (FPIRTRN) page
- Vendor Products Filter (FPIVPRD) page
- Vendor Products Validation (FPVVPD) page
- ▣ Research Accounting Payments Entry (FRAAREV) page
- ▣ Research Accounting Unbilled Status Control (FRABDCN) page
- ▣ Run Standard Bills and Reports (FRABRUN) page
- ▣ Grant Budget (FRABUDG) page
- ▣ Proposal Budget (FRABUDP) page
- ▣ Grant Billing Collections (FRACOLL) page
- ▣ Grant Events Assignment (FRAEVGA) page
- ▣ Grant Event Action (FRAEVNG) page

**Requisition Validation (FPIRQST) page**

Use the Requisition Validation page to list all requisitions.

All fields are display-only and are populated when you enter the form.

You can filter the **Vendor** field to locate all requisitions for a selected vendor.

Fields	Descriptions
Request Number	Code representing the requisition.
Requestor Name	Name of the person who created the requisition.
Request Date	Date the requisition was placed
	Type of requisition.
Request Type	<ul style="list-style-type: none"><li>• S = Stores requisition</li><li>• P = Purchase requisition</li></ul>