NFCC

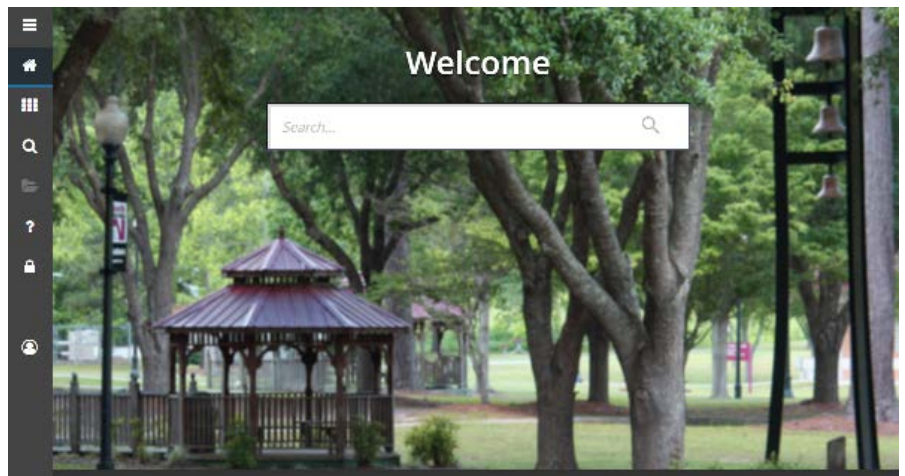# North Florida Community College

Banner 9 Migration Tips

Institutional Research

November 2018

## Contents

Welcome to Banner 9!

NFCC is migrating from Banner 8 to Banner 9 and there have been various issues reported as we make the move. Knowing that we are approaching a deadline for the transition, we wanted to put together some resources and helpful information to try and make this smooth for all Banner users.

Navigating the Banner 9 User Interface

A good first step is to watch this video. If you are having trouble finding items that used to be in Banner 8 this will clarify most questions. This video has been produced by Ellucian to familiarize people with the new interface in Banner 9.
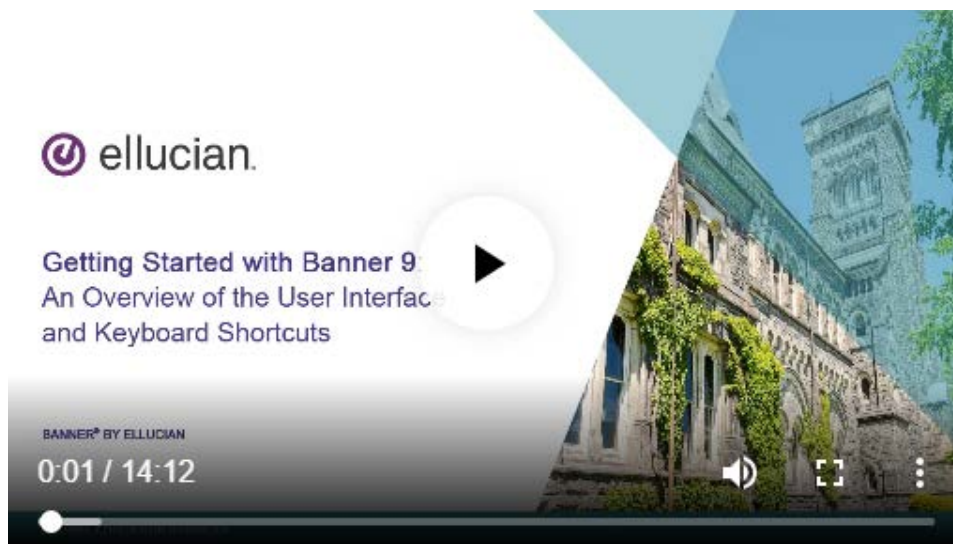
Recommended Browsers for Banner 9 (No Explorer or Edge)

Most issues being reported are browser related, so we will start there.

The three browsers that we recommended for Banner 9 are the following:

 Chrome

 Firefox

 Safari

* Please note that Internet Explorer and Edge are not on this list.

Banner 8 was only supported by Internet Explorer and this will be the biggest change for Banner 9 users. You must only use the three browsers listed above if you want to run Banner 9 smoothly. Although Elucian claims it supports Edge, NFCC, as well as many other institutions, cannot agree with that statement currently.

NFCC Banner 9 Migration Tips

Set One of the Recommended Browsers as Your Default
Internet Explorer and Edge browsers are shipped with Microsoft products, however they are not compatible with Banner 9. If either of these is your current default browser, we recommended you choose a new default browser to help with any confusion when using Banner 9.

To change your default browser in Windows:

1. On your computer, click the Start menu
2. Click Settings. ⚙
3. Select "Apps".
4. Select "Default Apps".
5. At the bottom, under "Web Browser," click your current browser (typically Microsoft Edge).
6. In the "Choose an App" window, select Chrome, Firefox, or Safari.

Note: Most Mac users will have Safari as the default browser so no changes are needed.

Why Did My Banner 9 Session Expire?
In order to optimize performance and security, Banner 9 will expire after 90 minutes of inactivity. When it expires, be sure to close all the open tabs and re-launch the browser before logging back in.

What do I do if I Get a Service Invocation Failed error message?
Sign out of Application Navigator using the Sign Out link in the upper right corner. Access Banner 9 again, OR clear your browser cache and cookies. Close your browser windows and access Banner 9 again.

What is a browser cache? (and why should I care?)
In computing, a cache is a hardware or software component that stores data so that future requests for that data can be served faster; the data stored in a cache might be the result of an earlier computation or a copy of data stored elsewhere. Therefore as new updates occur or you jump to different screens, the browser may be "stuck in the past" and not loading your pages with updated data.

I am unfamiliar with these Browsers, I always used Internet Explorer. Help!
Change can be tough sometimes and we understand. In the next few pages we will give you some information to help with the transition. The most useful thing you will learn is how to clear the cache in each browser. Another common problem with a new or unfamiliar browser may be updating your tool-bar, favorite, and bookmark links, so we will cover that also.

Once you have chosen a browser, please go to the appropriate page below.

Chrome Browser Tips
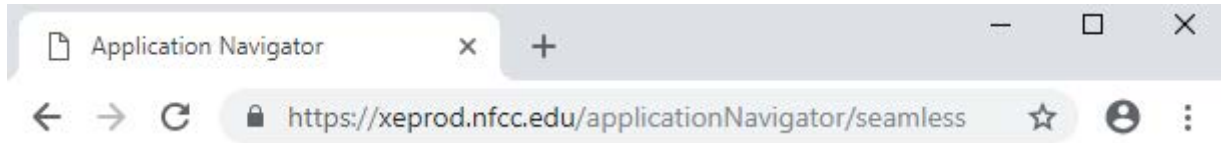
Chrome Clear Cache Steps

1. Click the ellipsis ⋮ found at the far right end of the line that contains the web site (URL).
2. From the menu that appears, click "More tools" and then "Clear browsing data".
3. At the top, choose a time range. To delete everything, select All time.
4. Next to "Cookies and other site data" and "Cached images and files," check the boxes.
5. Click "Clear data".

Shortcut: Ctrl+Shift+Del

Turn on the Menu bar or Bookmarks Toolbar

1. Click the ellipsis ⋮ found at the far right end of the line that contains the web site (URL).
2. Click the "Bookmarks" option.
3. On the sub menu check "Show Bookmarks Bar

Shortcut: Ctrl+Shift+B

Adding Bookmarks

1. Open up the page you want to add a bookmark to.
2. Click the star ☆ in the URL box.
3. A box should pop up.
4. Choose a name for the bookmark. Leaving it blank will only show the icon for the site.
5. Choose Bookmarks Bar folder.
6. Click "Done" when you're finished.

Firefox Browser Tips

Firefox Clear Cache Steps

1. Click the Open menu icon ☰ found at the far right end of the line that contains the web site (URL).
2. Click "Options" from the menu that appears.
3. Select the "Privacy & Security" option from the left column.
4. In the Cookies and Site Data section, click "Clear Data…"
5. With Cached Web Content check marked, click the "Clear" button.
6. A message will pop-up to verify the action, click the "Clear Now" button.
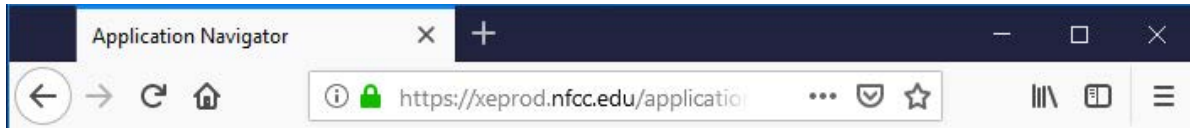7. Close ✕ the Options page

Shortcut: Ctrl+Shift+Del

Turn on the Menu bar or Bookmarks Toolbar

1. Click the Open menu icon ☰ found at the far right end of the line that contains the web site (URL).
2. Click "Customize" from the menu that appears.
3. At the bottom of the Customize screen, click the "Toolbars" drop-down.
4. Check the "Bookmarks Toolbar" selection.
5. Click Done.

Adding Bookmarks

1. In Firefox, browse to the website you wish to bookmark.
2. In the toolbar at the top of the screen, click on the Star ☆ icon.
3. Edit the bookmark name to customize it.
4. Select the Bookmarks Toolbar folder.
5. Click Done.

Safari Browser Tips

Safari Clear Cache Steps

1. Click the Open menu icon ⚙▾ found at the far right of the line that contains the web site (URL).
2. Click "Preferences..." from the menu that appears.
3. At the top of the Preferences screen, click the "Privacy" tab.
4. Click the "Remove All Website Data.." button.
5. Close ✕ the Preferences window.
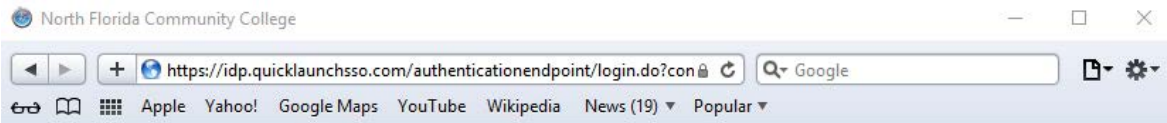
Turn on the Menu bar or Bookmarks Toolbar

1. Click the Open menu icon ⚙▾ found at the far right of the line that contains the web site (URL)
2. Click "Show Bookmarks Bar" from the menu that appears.

Shortcut: Ctrl+Shift+B

Adding Bookmarks

1. Click the Plus ✚ button found at the far left of the line that contains the web site (URL)
2. In the screen that pops up under "Add this page to:", select "Bookmarks Bar"
3. Click the "Add" button.

General FAQ

What will stay the same?
- Data and the way data is entered
- Seven character form names (such as SPAIDEN, PPAIDEN, FOAIDEN, APAIDEN)
- Users' security access to forms

Will I be able to access the forms I currently have permission to in Banner 8?
Yes, your access to pages (formerly called forms) will not change.

Is there an Options Menu to bring you to associated forms in Banner 9?
Yes, there is still a means to get to associated pages, now called "Related to Current". This is accessed via the 'Go To' menu.

From within a page, can you navigate from section to section without using the mouse?
Yes, you will be able to navigate from section to section using the PageUp and PageDown keys.

Will a user be able to type in an acronym directly instead of having to navigate a list? For example, typing in SCADETL in INB takes you directly to the form.
Yes, there will be the ability to navigate to a page by either the 7 letter acronym or by the page name.

Will the names of pages (formerly called forms) still be the same?
Yes, you will be able to search for pages (formerly called forms) by their seven character name such as SPAIDEN, PPAIDEN, APAIDEN etc. An enhancement in Administrative Banner is the ability to find a page by its description. For instance, if the text "general student" is entered in the search bar, the SGASTDN page will be retrieved for you to select.

I have set up my frequently-used forms under My Banner. Will this continue to work?
Yes, My Banner is still available. Enter 'my banner' in the search field on the Welcome page to access your list of pages.

Why can't I do an insert and copy a previous record like I did in Banner 8?
Banner 9 only requires you to highlight the record you want to copy and select the Copy action (F4).

Will my keyboard shortcuts continue to work?
Some keyboard shortcuts will work. Others had to be changed. This is because Administrative Banner is completely internet based where key strokes are already in use.

How do I make Banner BIGGER?
- Ctrl + increase zoom (essentially ctrl with +)
- Ctrl – decrease zoom
- Ctrl 0 reset zoom to 100%

General FAQ (continued)

Does the Percent Sign (%) still work in searching?
Yes, you will be able to use wildcard searches when searching. Though, you may not need to use them all the time. There is a new feature in Administrative Banner called 'auto complete' that provides a list of items that match what you are typing. It assumes the wildcard at the beginning and the end of the entered text.

Why is no data returned when using the Filter feature?
Filtering tips:
- Filters are case sensitive.
- Verify that you have selected the appropriate operator from the drop down.
- Multiple fields can be selected to narrow your results.

Where did the Next Block, Previous Block and Save buttons go?
In Banner 9, Blocks are now Sections. The Next Section, Previous Section arrows are located in the lower left corner of the page. The SAVE/CANCEL/SELECT buttons are located in the lower right corner of the page, depending on the page.

Will QuickFlows still be available in Banner 9 Admin?
QuickFlows will still be available in Banner 9 Admin. For information about creating and using QuickFlows, visit the Banner 9 website.

Why are the Insert, Delete, and Copy actions deactivated (grayed out)?
You must have your cursor active in the section you want to use the action in. If these actions are not available for that section, they will remain deactivated.

What do I do if I get a Service Invocation Failed error message?
Sign out of Application Navigator using the Sign Out link in the upper right corner. Access Banner 9 again, OR clear your browser cache and cookies. Close your browser windows and access Banner 9 again.

Banner Keyboard Shortcuts

The following table lists the keyboard shortcuts that you can use to navigate through Banner versions 8 and 9. Actions with new or updated keyboard combinations in Banner 9 are indicated by bold entries.

Action	Banner 8	Banner 9
Application Navigator		
Access Help	Banner 9 keyboard shortcuts will work in Banner 8 if you are running Banner 8 with Application Navigator and have applied the keyboard shortcut configuration settings.	CTRL+M
Access Menu		CTRL+Y
Display recently opened items		CTRL+SHIFT+L
Search		CTRL+SHIFT+Y
Sign out		CTRL+SHIFT+F
Banner Document Management (BDM)		
Add BDM Documents	Icon or Menu	ALT+A
Retrieve BDM Documents	Icon or Menu	ALT+R
Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL+Q	CTRL+Q
Change MEP Context	Not applicable	ALT+SHIFT+C
Choose/Submit	ENTER	ENTER
Clear All in Section	SHIFT+F5	SHIFT+F5
Clear One Record	SHIFT+F4	SHIFT+F4
Clear Page or Start Over	SHIFT+F7	F5
Count Query	SHIFT+F2	SHIFT+F2
Delete Record	SHIFT+F6	SHIFT+F6
Down/Next Record	Down Arrow	Down Arrow
Duplicate Item	F3	F3
Duplicate Selected Record	F4	F4
Edit	CTRL+E	CTRL+E
Execute Filter Query	F8	F8
Exit	CTRL+Q	CTRL+Q
Expand/Collapse Drop-down Field	Click field	ALT+Down Arrow
Export	Extract Data with Key or Extract Data no Key	SHIFT+F1
First Page	Not applicable	CTRL+Home

Banner Keyboard Shortcuts (continued)

Action	Banner 8	Banner 9
Insert/Create Record	F6	F6
Last Page	Not applicable	CTRL+End
List of Values	F9	F9
More Information	ALT+H	CTRL+SHIFT+U
Next Field or Item	Tab	Tab
Next Page Down	Page Down	Page Down
Next Section	CTRL+Page Down	ALT+Page Down
Open Menu Directly	F5	CTRL+M
Open Related Menu	Not applicable	ALT+SHIFT+R
Open Tools Menu	Not applicable	ALT+SHIFT+T
Page Tab 1 **Page Tab 2** **and so on**	Not applicable	CTRL+SHIFT+1 CTRL+SHIFT+2 and so on
Previous Field or Item	SHIFT Tab	SHIFT Tab
Previous Page Up	Page Up	Page Up
Previous Section	CTRL+Page Up	ALT+Page Up
Print	SHIFT+F8	CTRL+P
Refresh or Rollback	SHIFT+F7	F5
Save	F10	F10
Search or Open Filter Query	F7	F7
Select on a Called Page	CHIFT+F3	ALT+S
Toggle Multi/Single Records View	Not applicable	CTRL+G
Up/Previous record	Up Arrow	Up Arrow
Workflow		
Release Workflow	Icon or Menu	ALT+Q
Submit Workflow	Icon or Menu	ALT+W

Helpful Links

The following is a list of links that may also help with your transition to Banner 9.

What's New in Banner 9

Banner 9 Manual

Banner 9 - Financial Aid

NOTE:
This is a living document and
may be updated at any time.