

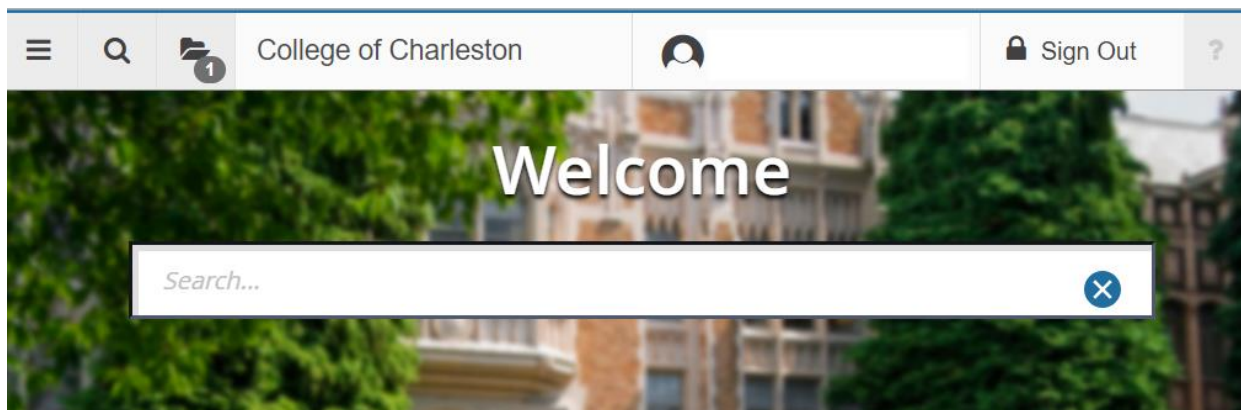
Banner 9 FAQs

This article contains frequently asked questions for Banner 9. Please defer to IT for additional information.

- **How do I open Banner 9?**

Go to <https://banner.cofc.edu/applicationNavigator>.

Log in with your Cougars username and password.



- **When are we upgrading to Banner 9?**

- Banner administrative pages will be upgraded in January 2019.

- **What is Banner 9 and why are we upgrading?**

- Banner 9 introduces a modernized look and feel for Banner Administrative pages, but the functionality remains unchanged. Users will benefit from an intuitive, modern experience, whether they're accessing the Administrative pages from their computer or mobile device.

We are required to upgrade by the end of 2018 because vendor support for the Banner 8 administrative forms ends as of January 1, 2019.

- **What changes can I expect to see in Banner 9?**

- Banner 9 has a modernized user interface with improved navigation and accessibility. While the pages look different, they contain all of the same fields and sections that you are familiar with in Banner 8.

- **Why does Banner 9 performance seem slower than Banner 8?**

- Banner 9 is built on different technology which does not allow for some of the same capabilities that were available in Banner 8. Banner 8 forms are in a static architecture that allows users, for example, to type ahead and have the data filled in behind. The new architecture does not allow some of that static page capability.

Banner's vendor, Ellucian, has made performance and usability a top priority and will continue to work to improve performance in the Admin pages to make them as fast as possible.

- **Who do I contact if I experience issues in Banner 9?**

- Please contact the IT Helpdesk (helpdesk@cofc.edu) should you experience any problems.

- **What browsers are supported?**

- All major browsers are supported however, Internet Explorer is not recommended due to performance issues found in testing. (However IE is still the preferred browser for Banner 8's BDM, so please feel free to use it for BDM, and do not update your Java until Banner 8 is gone.)
- **Where can I see demonstrations of Banner 9?**
- A navigational demo video has been created and can be accessed on your CougarEd dashboard: <https://cofc.myabsorb.com/#/dashboard>.
- **Where can I go to get more familiar with Banner 9?**
- A Banner 9 test environment has been created to allow current Banner users to experience Banner 9. Please click this link to access: <https://banner.test.cofc.edu/applicationNavigator>
- **How do I search for someone by name in the keyblock of a page since there doesn't appear to be a name field like there is in Banner 8?**
- Banner 9 pages that include an ID field also have a hidden name field that can be used to search by name, just like you could in Banner 8. In order to access the hidden field simply tab out of the ID field to access the name field.

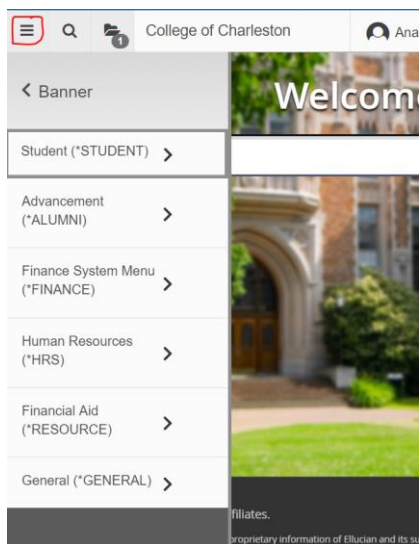
When cursor is in the ID field:



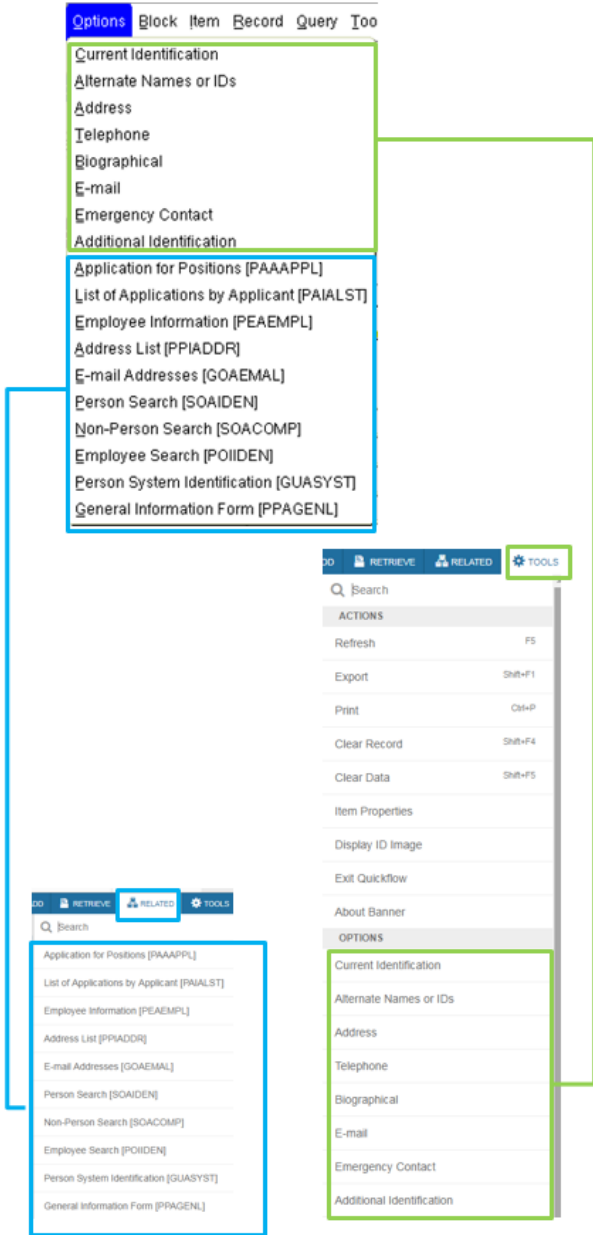
The hidden name field is exposed after tabbing out of the ID field:



- **Where do I find the menus?**
- Click the triple-line icon on the top-left to open the menu toolbar. Make a selection from the "Banner" options. Alternatively, start typing the name of the desired form in the "Search..." box on the Welcome screen.



- Where can I find the items that were available under the Banner 8 Options dropdown menu?
- Banner 9 has separated these items out into two separate dropdown menus: **Related** and **Tools**. The **Related** menu contains the related pages that were previously listed under options and the **Tools** menu contains the actions that were listed there.

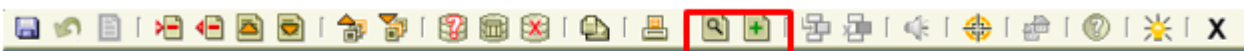


Banner 8

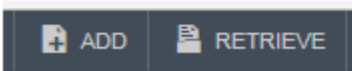
Banner 9

- How do I access BDM (Banner Document Management) in Banner 9?
- BDM can be accessed by clicking on **Add** and **Retrieve**

Banner 8



Banner 9



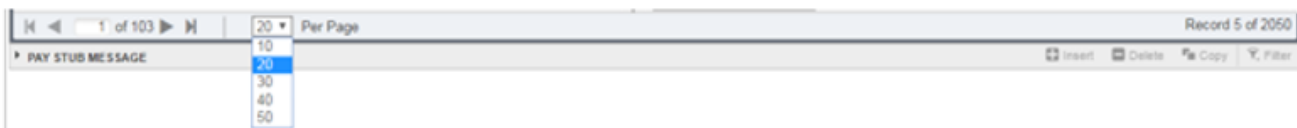
*As of February 2019, you may be asked to reenter your credentials when entering BDM. This is a known issue we are working to resolve. Please enter your credentials as instructed. Also, you may use Banner 8 on Internet Explorer for BDM until the issues are resolved.

- **How do I change between Compact and Expanded layout in Banner 9 Admin pages?**
- Banner 9 gives you the option of viewing the Banner 9 pages in an Expanded or Compact view. The Compact view reduces the amount of white space on a page, allowing for the visibility of more fields on a page. You can toggle between the two views in the Page Layout section of the Tools menu.
- **Can I control my user preferences in Banner 9 like I can in Banner 8?**
- Users are unable to create custom color schemes or add custom links to their main page in Banner 9.
- **What are the keyboard shortcuts in Banner 9?**
- Some keyboard shortcuts have changed in Banner 9. Please reference the keyboard shortcuts menu on the bottom right section of the Banner 9 homepage or this image below for an updated list of shortcuts.

Application Navigator Access Menu CTRL + M Recent Open Items CTRL + Y Search CTRL+SHIFT+Y Sign Out CTRL+SHIFT+F	Banner Document Management (BDM) Add Doc ALT + A Retrieve Doc ALT + R Workflow Release Workflow ALT + Q Submit Workflow ALT + W	General Navigation Exit CTRL + Q Go/Next Sec ALT + Page Down Prev Section ALT+PageUp Toggle Multi/Single Record CTRL +G Expand/Collapse Drop-down field ALT+Down Arrow	Page Tab 1 CTRL+SHIFT+1 Page Tab 2 CTRL+SHIFT+2 Related Menu ALT+SHIFT+R Tools Menu ALT+SHIFT+T
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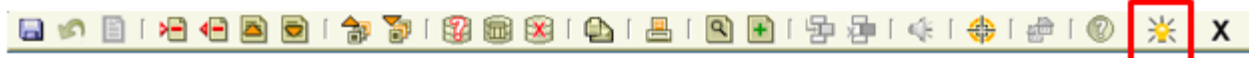
Escape	shift	F1 Export	F2 Count Query	F3 Dup Item	F4 Dup Record Clear Record	F5 Start Over Clear All	F6 Ins Record Delete Rec	F7 Search	F8 Execute Query	F9 List of Values	F10 Save
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- **Will the personalized My Banner menu I created in Banner 8 remain in Banner 9?**
- Yes, your My Banner menu will carry over from Banner 8. Please contact IT for more information on creating and maintaining your personalized menu.
- **How do I get more records to display on a page in Banner 9?**
- Banner 9 gives you the option of displaying fewer or more records on the screen for certain pages. Click on the **Per Page** dropdown at the bottom of the list of records on these screens to control the number of records displayed. Please note that your choice is not retained upon exiting the page.

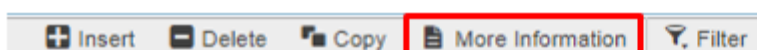


- **How do I get to SDE (Supplemental Data Engine) fields in Banner 9?**
- SDE information can now be found by clicking on **More Information**.

Banner 8



Banner 9



- **Is Banner self-service changing?**
- Only the administrative pages will be changing with this upgrade. Refer to IT for updates about SSB.
- **Is MyCharleston (Luminus) changing?**
- No. Only the Banner administrative pages will be changing with this upgrade. Refer to IT for updates about changes to Luminus.
- **Will my security access change with Banner 9?**
- No. Your Banner form/page security will be the same in Banner 9 as it was in Banner 8.
- **Will I be able to continue using Banner 8 after Banner 9 is launched?**
- No. Banner 8 will no longer be available after Banner 9 is fully launched. All users should start using Banner 9 exclusively in February 2019.*

*As of February 2019, Banner 8 is still necessary for Banner's custom forms (Banner forms with the letter "Z" in the title (ex: SZASECT) and WOA HOLD).

- **I've been told to clear my browser cache after each upgrade. What's the easiest way to do that?**
- Users can hit **Ctrl+Shift+Delete** in any web browser to bring up the window that will allow them to clear their cache.
- **Is Java required for Banner 9?**
- No, Java is not required for Banner 9. Banner 9 is web based and therefore does not require the Java plugin like Banner 8 does.

More questions?

For general information about the Banner system, please contact IT. Please defer to IT as the authoritative source of information about our ERP. This document is only intended to be used as a resource and is subject to change. For detailed information about the use of specific administrative forms within Banner, please contact the responsible office (Office of the Registrar, Office of the Provost, Human Resources, Business Affairs, etc).