

Banner Navigation

George Mason University

Workshop Overview

The Navigation workshop will give a brief overview of how to access and move around in Ellucian Banner 9 Admin Apps, including your responsibilities regarding the privacy requirements of working with sensitive personal data, what you will need to access the Banner system, how to move around in the system, and some specific searching techniques for finding and retrieving information.

Before You Start

Your Responsibilities

Individuals learning to access information via the Banner 9 Admin Apps application must be aware of the Federal and University requirements regarding controls over personal information and the responsible use of computing facilities. **EVERYONE MUST SIGN THE ACCESS FORM INDICATING KNOWLEDGE AND UNDERSTANDING OF THESE REQUIREMENTS AS WELL AS WILLINGNESS TO ACCEPT AND ABIDE BY THE REQUIREMENTS.**

Family Educational Rights and Privacy Act (FERPA)

(More information is available at <http://registrar.gmu.edu/topics/category/student-privacy/>)

Student information is considered confidential. Individuals working with database information on students may not disclose or disseminate any information from their records to anyone other than the student themselves without the express written consent of the student and the approval of their unit supervisor. School officials (including employees and faculty members) are permitted access to student records without written consent for the purpose of **legitimate educational interests** that require access to student information in order to fulfill a professional responsibility.

Responsible Use of Computing (RUC)

(Mason Policy #1301, available at <http://universitypolicy.gmu.edu/policies/responsible-use-of-computing/>)

RULE 1: Use Mason Computing Resources Consistently with the Stated Priorities (educational in nature).

RULE 2: Don't Use, or Allow Anyone Else to Use Your Account for Illegitimate Purposes.

RULE 3: Honor the Privacy of Other Users.

RULE 4: Don't Impersonate Any Other Person.

RULE 5: Don't Use Mason Computing Resources to Violate Other Policies or Laws.

Accessing Banner Admin Apps

Banner Account

To obtain access to Banner 9 Admin Apps, you must submit an Account Request Form signed by yourself, your supervisor, and your Banner unit liaison, and attend the Banner Navigation and FERPA 101 workshops. Your account will be created (or modified if you have an existing Admin Apps account) by the Banner Security Administrator, who will e-mail you confirmation of your access. Additional information about the account request process is available on Patriot Web (login and select Employee Services/Request Access to Banner Products).

Banner Splash Page

Any web browser can be used to access Banner 9 Admin Apps, although Internet Explorer is not recommended, including those on mobile devices. To access Admin Apps, go to the website <https://patriotweb.gmu.edu/admin/>; this will guarantee that all functionality is available.

The screenshot shows the Banner 9 Administrative Systems splash page. At the top left is the George Mason University logo. To the right is the title "ADMINISTRATIVE SYSTEMS" in large green letters. Below the title is a yellow horizontal bar. The main content area is a light yellow box with a rounded top-left corner. Inside this box, there are several sections: "Production" with links for "Patriot Web Self Service" and "Internet Native Banner"; a "Warning" section; "Customer Service" with links for "Patriot Web Alerts" and "Patriot Pass Password Management"; "Reporting" with links for "MicroStrategy", "e-Print Reports", and "Oracle Reports"; "Other Applications" with links for "Evisions IntelleCheck", "Foundation Accounts System", "Fund/Org Lookup Form", "Pooled Position Lookup Form", and "WorkFlow"; and "Resources" with links for "Data Standards Document (pdf)" and "Printer Installation Procedure". Numbered callouts 1 through 6 are placed around the page: 1 points to "Patriot Web Self Service", 2 to "Patriot Web Alerts", 3 to "Patriot Pass Password Management", 4 to the "Other Applications" section, 5 to "Internet Native Banner", and 6 to the "Technical Assistance" email link.

Unauthorized use of this system and its material is strictly forbidden and may constitute a violation of state and/or federal law. This is unpublished material and contains confidential information. Unauthorized reproduction, distribution, display, disclosure, and/or possession of this material are prohibited. By using this system, you agree to abide by George Mason University's [Responsible Use of Computing Policy - Number 1301](#) and the [Student Information Security Statement](#).

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Technical Assistance: support@gmu.edu
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1. **Patriot Web Self Service:** this link is provided for your convenience.
2. **Patriot Web Alerts:** gives details of any Banner related outages.
3. **Patriot Pass Password Management:** click here to change your password.
4. **Related links:** links to applications and web pages related to Admin Apps.
5. **Link to Banner:** click this link to access Admin Apps.
6. **E-mail for technical assistance:** Or you can call 703-993-8870.

A current version of this guide and similar documents can be found online at <https://docushare.gmu.edu/dsweb/View/Collection-12274>.

System Availability

Banner (both Admin Apps and Patriot Web Self-Service) is generally available twenty-four hours a day, seven days a week, except for Sunday morning backups. For up-to-date information about the system (outages, upgrades, alerts), follow the link to System Information/Alerts.

Data Standards

George Mason University requires compliance with defined data entry standards to ensure data quality. Follow the link to Data Standards for documentation of data entry procedures, such as use of punctuation, capitalization and abbreviations. Those individuals who enter data into the system will receive additional training in data entry standards.

Banner Databases

There is a difference between Patriot Web Self-Service (general access) and Admin Apps (back office access). While the administrative splash page may change somewhat, Admin Apps databases are listed on the left side, and individuals will be using PRODUCTION for all normal work in Admin Apps. Do not attempt to log on to other databases unless necessary, as your data entry will not be logged in the person's official record.

Log On:

Note: All Banner 9 Admin Apps users must have Two Factor Authentication (2FA) set up. New employees set up 2FA during their initial password setup. If you do not believe you have set up 2FA, or would like more details or instructions, they can be found at <http://2fa.gmu.edu>.

1. Type your Banner username in the Mason NetID box. Your NetID/username is the first part of your Mason e-mail address (i.e., anetid).
2. Tab or mouse click on the Password field, and then type your Patriot Pass password. See the section *Changing Your Password* for more details on managing your password. Click Login.
3. Complete your Two Factor authentication if it is required (if you have used the Remember Me option, you will not be prompted for seven days).
4. The first time you log into Admin Apps, and each time you change your password, you will be prompted for your Oracle password. Re-enter your Patriot Pass password if you are prompted to do so.

Changing Your Password:

Your Banner 9 Admin Apps password is automatically synced with your Patriot Pass password. If you are unable to log into Admin Apps, try changing your password using the Patriot Pass site: <https://password.gmu.edu>. When you receive confirmation of your Admin Apps access, you will need to change your password before you can log in for the first time.

Off-Campus Access

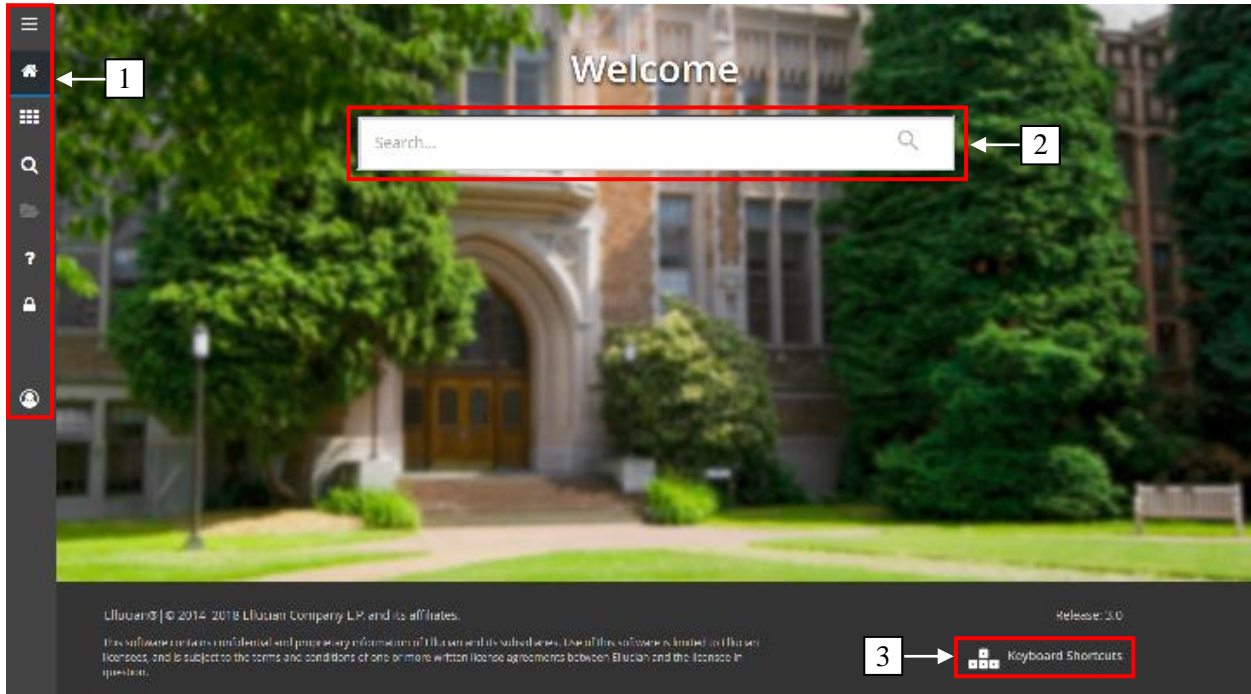
If you are accessing Banner 9 Admin Apps from off-campus or on a wireless network, you will need to use the Cisco AnyConnect VPN client. Instructions for installing and using this software can be found at <http://vpn.gmu.edu>.

Cisco AnyConnect also requires Two Factor Authentication (2FA); separate from the login to Banner 9 Admin Apps. More details on Mason's 2FA and instructions for how to use 2FA with VPN can be found at <http://2fa.gmu.edu>.

Landing Page/Dashboard

A current version of this guide and similar documents can be found online at <https://docushare.gmu.edu/dsweb/View/Collection-12274>.

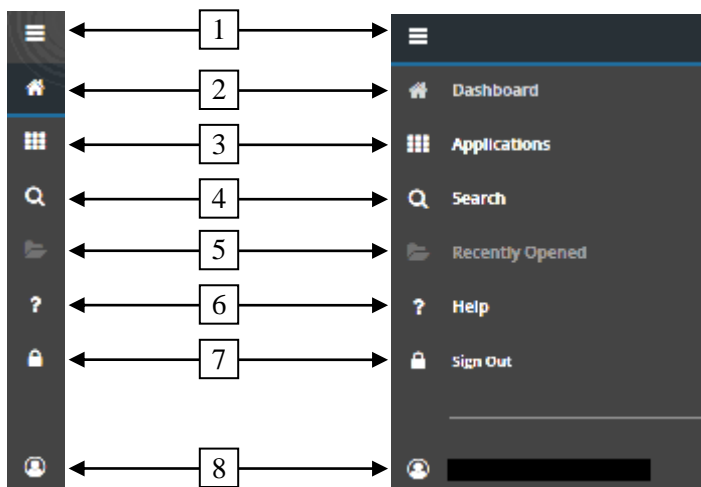
The **Landing Page**, or **Dashboard**, in Banner 9 is the first page that opens when you log into Banner 9.



1. The **Menu Bar** provides different menu options; items grayed out are not available on this page.
2. The **Search Box** allows you to find pages via abbreviation or description.
3. The **Keyboard Shortcuts** link allows you to view any available keyboard shortcuts.

Menu Bar

The Menu Bar is how you navigate through Banner 9. It will follow you between pages, giving you access to smoothly transition between pages and applications.



1. The Menu icon expands the Menu Bar.
2. The **Dashboard** icon takes you back to the Landing page.
3. The **Applications** icon will show the various folders and pages you can access.
4. The **Search** icon allows you to access the same page search functionality present on the Landing Page from anywhere in Banner 9.
5. The **Recently Opened** icon gives you an easy way to access pages you recently opened.

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6. The **Help** icon links to online help about the current page.
7. The **Sign Out** icon ends your INB session.
8. The **Profile** icon shows whose INB session this is.

Working with Pages

Pages are generally categorized as **menu** for navigation, **application** for entering and viewing data, **query** or **inquiry** to retrieve specific information into application pages, and **validation** for defining acceptable values in certain fields.

Opening a Page

To open a page from the Landing Page, you can use the Search Box or the Application icon. Searches are not case sensitive, and may be performed using either the seven-letter page name, or any part of the page description.

For instance, to access the General Person Telephone Page, you could go to the Applications icon and click on Banner/Student (*STUDENT)/General Person (*PERSON)/General Person Telephone (SPATELE). Alternatively, you could use either the Search Box or Search icon and type “spatele” or “telephone” (minus the quotes).

Note: If you are on a page other than the Landing Page, you can still use the Search icon, so you do not have to return to the Landing Page to navigate through INB.

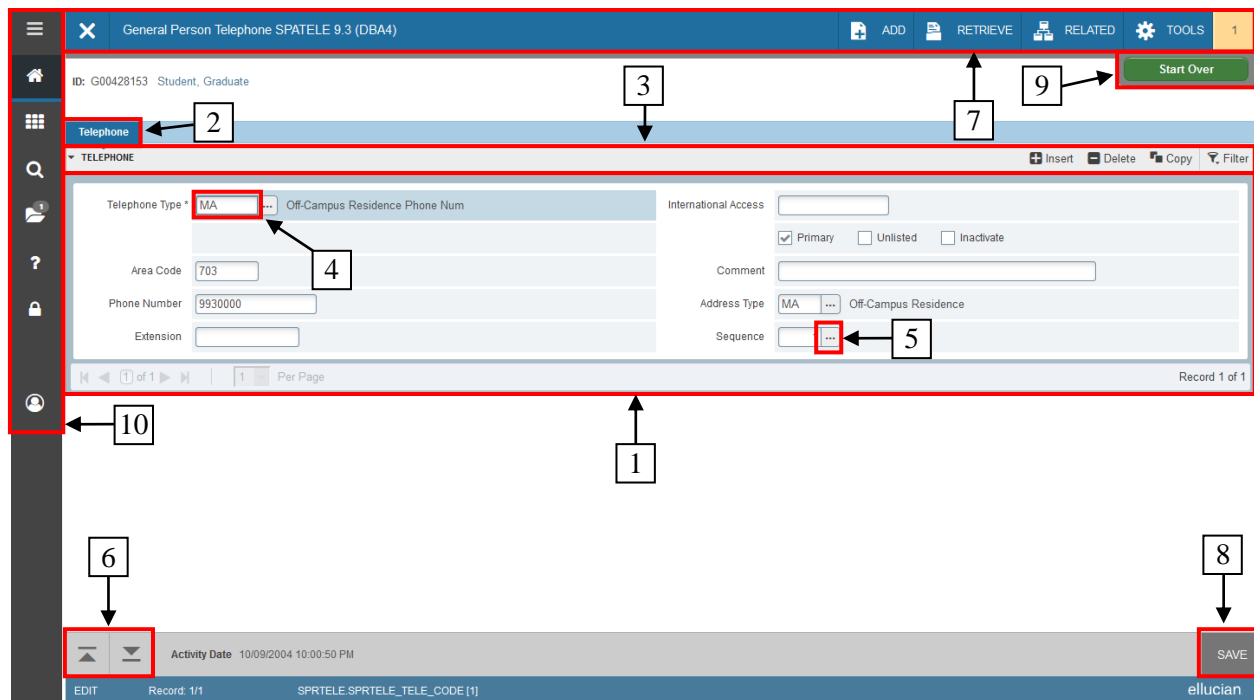
Elements of a Page

When you first open a page, only the Key Section, also known as the ID Section, will display. You will use this section to find and select the person you are looking for.



1. The **ID** field allows you to search for a person by G Number or NetID.
2. Once the ID field is properly filled, click the **Go** button to view the person’s information.

Once you have selected a person, the rest of the page will display.



1. **Sections** are logical groupings of information. The **Information Section** contains all the Sections on one Page
2. **Tabs** are logical groupings of Sections.
3. The **Section Header** allows you to expand or collapse a section and includes buttons for common actions.
4. **Fields** are specific items of information. A group of related fields comprises a Record.
5. **Search** gives access to the set of predefined codes or information used by a particular field, identified by an ellipses icon next to the field.
6. **Previous** and **Next Section** icons are used if there are multiple sections on a single page.
7. The **Page Menu** gives access to many commonly used functions. Not all functions may be available on all pages.
 - a. The **Close** button closes the current page.
 - b. The **Related** button shows related pages to the current one.
 - c. The **Tools** button shows actions you are currently able to perform.
 - d. The **Notification Center** will only appear if there is a notification. It will be represented by a number at the far right of the Page Menu.
8. The **Save** button will save any changes made to the page.
9. The **Start Over** button will discard any unsaved changes and allow you to select a new person.
10. The **Navigation Menu** allows you to access other pages.
 - a. The **Menu** button allows you to navigate through folders.
 - b. The **Search** button allows you to search for other pages.
 - c. The **Recent Pages** button shows you recently opened pages.

Working in Pages

The general process for working in pages is:

- 1) Select the page from the Applications Menu or use one of the Search Boxes to find it.
- 2) Enter information in the **Key Section**; use the search function if necessary.

- 3) View data in the **Information Section** and move between sections using the **Previous** and **Next Section** buttons.
- 4) If information is changed, save using the **Save** button.
- 5) Use the **Start Over** button to discard changes and/or return to the **Key Section**.

Searching for People

You can search for people by ID number, NetID, or by name, and there are several methods for each. Keep in mind that the Banner database contains employees, applicants for employment or admission, and all current and previous people. When searching by name, you will often find many matches. If you see two people who have separate G-Numbers but are clearly the same person (same name, same date of birth, same job or field of study), please refer to the section on *Reporting Multiple Identifications*.

Note: For security purposes, Social Security Number, NetID, and birth date are partially masked in all search forms. The SSN will display as *****1234 or 1234, the NetID will display as *****abc or abc, and the birth date will display in the format MM/DD.

ID Search

An ID search can be performed when the person's G-Number, NetID, or SSN is known. Since students are not required to provide an SSN, not all students can be located by SSN.

The fastest way to find a person when the G-Number, NetID, or SSN is known is to use the ID field in the Key section.

1.	Enter a known G-Number, NetID, or Social Security Number in the ID field of the Key section.	The person's name will display in the Name field of the Key section.
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Name Search

There are two methods of searching by name. Partial names require the use of a wildcard to represent missing characters. Percent (%) represents any number of missing characters. Underscore (_) represents a single missing character.

Examples of wildcard searches include:

m%donald	MacDonald, Steven MacDonald, Jeff Mc Donald, Justin McDonald, Jeffrey
m%donald, j%	MacDonald, Jeff Mc Donald, Justin McDonald, Jeffrey
m_donald, j%	McDonald, Jeffrey
Mcdonald, jef%	McDonald, Jeffrey

Method 1: Name Search Using Extended Search

You may search for a person by typing his/her name in the Name field of the Key section using the format [last], [first].

Note: Last name is required for this search option. First name is optional, but must be preceded by a comma and a space as indicated above.

1.	In the Key section of a form, remove any data in the ID field and press <Tab> .	Your cursor will appear in the <i>Name:</i> field (to the right of the <i>ID:</i> field).
2.	Type the last name only or the last name and first name separated by a comma and a space (,).	Omit all punctuation, such as apostrophes and hyphens, and use wildcards in order to find all variations.
3.	Click the Go button to verify the name.	If an exact match is found, the ID number will appear in the <i>ID:</i> field. If multiple matches are found, a new search window will display. In this case, the number in the top-right corner reflects the number of matching entries, and the <i>Press to See Results</i> button will list the matching entries alphabetically, with prior names and ID numbers indented.
4.	If the results button contains too many matches, you may narrow your search results by entering additional criteria, such as city, state, zip, date of birth, or gender using the options in the Extended Search window, then click the Search icon. If you do not like the results you get, use the rollback button at the bottom right of the search window to go back to your original search.	Date of birth and gender are the most reliable ways of narrowing searches. Dates must be entered in the format MM/DD/YYYY, and using a “t” will automatically insert today’s date.
5.	Use the results button to select a person.	The person’s name and ID will display in the Key section.

Method 2: Name Search Using Person Search:

The Person Search form (SOAIDEN) can be called directly from the Banner menu or from the Key section of a page.

1.	If you are searching from the Key section, click the Search icon to the right of the <i>ID:</i> field. If you navigated directly to SOAIDEN from the menu, skip to step 3.	The Options List will display.
2.	Select Person Search .	The SOAIDEN form will display.
3.	Use the Add a Field drop down to select what type of information you would like to search.	You can search by ID, Last Name, First Name, Middle Name, Change Indicator, or Name Type. The last two options are rarely used in searches.
4.	Select what portion of the field you would like to search.	The options are Contains, Like, Starts With, Ends With, Equals, and Not Equal.
5.	If you wish to search additional fields,	

	repeat steps 3 and 4.	
6.	Execute the query.	The matching entries will display. You may need to scroll down to view all entries. The Change Indicator column on the far right is blank for the current name, I for a previous ID, or N for a previous name.
7.	Select the desired entry using the Select button.	The SOAIDEN form will close and the selected person's name and ID will display in the Key section of the original form or in the Key section of the next form opened.

Reporting Multiple Identifications

Multiple Personal Identification Masters (referred to as multiple PIDMs) occur when an individual is entered twice into the database, resulting in two G-Numbers with partial information on each. Multiple PIDMs typically have the same or similar names (such as Jim Swanson and James Swanson) and also share other key information (such as birth date, job, etc.). This situation can cause numerous problems for the individual and needs to be resolved as quickly as possible by merging the separate records onto a single G-Number. If you encounter what appears to be a multiple PIDM, please send an e-mail to support@gmu.edu with the individual's name(s), G Numbers, and the reason you believe this to be a multiple PIDM.

Navigation Shortcuts

For a full list of keyboard shortcuts, see <https://docushare.gmu.edu/dsweb/View/Collection-12274>.

Function	Shortcut
Menu Bar	
Menu	CTRL+Y
Display recently opened items	CTRL+SHIFT+L
Search Pages	CTRL+SHIFT+Y
Sign out	CTRL+SHIFT+F
Help	CTRL+M
Pages	
Save	F10
Start Over	F5
Select	ALT+S
Insert/Create Record	F6
Delete Record	SHIFT+F6
Next Field or Item	Tab
Previous Field or Item	SHIFT+Tab
Down/Next Record	Down Arrow
Up/Previous record	Up Arrow
Next Section	ALT+Page Down
Previous Section	ALT+Page Up
Search or Open Filter Query	F9
Execute Query	F8
Exit, Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL+Q
Open Related Menu	ALT+SHIFT+R
Open Tools Menu	ALT+SHIFT+T