Disclaimer

The views and opinions in this presentation are those of the presenter and do not necessarily reflect the position of Ellucian.
Introduction

- Purpose
  - To provide you with a look at how we approached the move the new Administrative pages for Banner 9.

- Benefits of attending this session
  - Where to get more information
  - See how we started the process
  - What we needed to do to install the new application
  - How we went about preparing the Users
USD’s Facts

- **Who we are:**
  - A private Catholic affiliated University with Undergraduate, Graduate and Law programs
  - Enrollment Head count 8508:
    - UG: 5711, GR/DR/Law: 2797
    - Faculty – F/T: 427  P/T: 436
  - A split ERP environment:

<table>
<thead>
<tr>
<th>Elucian</th>
<th>Oracle EBS</th>
</tr>
</thead>
<tbody>
<tr>
<td>General, Student, Fin Aid, AR, Workflow, SSB, ODS/EDW, Degree Works (in progress)</td>
<td>Finance</td>
</tr>
<tr>
<td>Luminis Portal</td>
<td>Human Resources</td>
</tr>
</tbody>
</table>
Our Banner 9 Deployments

- Application Navigator
- Catalog
- Schedule
- Student Overall
- Registration
- Registration SSB
- Student Advisor/SSB
- Faculty Grade Entry
- Ellucian Solution Manager

Our Hardware Environment

- IBM Power 7 System Database Server
  - OS - Unix AIX 6.1.9
  - 16 CPUs, w 50gig of memory and 12 gig of swap w/ an uncapped configuration

- XE Application Servers (8 XE deployments):
  - OS – Unix AIX 6.1.9
  - Power 8 System with 16 CPUs, 30GB memory, 12GB swap w/ uncapped configuration
  - Web Logic
  - Same server for both XE Registration and Registration SSB
Why move to Navigator/Admin Pages

- Ellucian/Oracle is de-supporting Oracle Forms
- New functionality is being coded with the admin pages
- New pages to support Banner 9 self-service Registration
- New functionality added to converted pages
  - Filtering,
  - Lookups / Searching,
  - Multiple record views,
  - Favorites and Recently Viewed pages,
  - Expand/Collapse sections within a page
Why move to Navigator/Admin Pages

- New tool sets are available for customization and branding
- Documentation available in the Support Center Documentation Libraries
  - Banner Transformed: Branding you Administrative Application
  - Banner Transformed: Getting Started with Your Administrative Application
  - Banner Transformed: Working with Eclipse and Your Administrative Application
  - Banner Transformed: Extending Your Administrative Application
  - Banner Extensibility Handbook 9.1
  - Configure Page Components for Self-Service Pages for Developers 9.1

Topic #3

Where do I start?
Where do I start?

Ellucian has a ‘Banner 9 Guide’ application on the Ellucian Support Home Page (Ellucian.okta.com/app/UserHome):

Do you

Where do I start?

The Banner 9 Guide Home page:

Your guide to adopting Banner 9

Plan Your Upgrade
Prepare Your Environment
Set Objectives and Enable SSO
Analyze Your Readiness

Learn More

Functional Resources
- Ellucian Vision
- Wrench Video on Moving to Banner 9
- Upgrading from Banner 8 to Banner 9 Webinar Recording
- Upgrading to Banner 9 FAQ

Technical Resources
- Banner 9 Sizing and Configuration Guide
- Ellucian eCommunities
- Banner Technical Space
- Banner 9 Implementation Workshops (click the Banner tab on the page that opens for more information)

Available Apps
Where do I start?

Assess where you are and the minimum requirements to Install the Student Admin Pages:

• Ellucian Solution Manager 1.7
• Banner General 8.8.4 with Patches:
  • 8.8.0.1, 8.8.2.1, 8.8.4.1 and 8.8.7.1
• Application Navigator 1.4
If you are running the following software these versions are required:
• Luminis 5.2.2 patch 51
• Banner Workflow 8.4
• Banner Channels 8.4.0.1

Where do I start?

Ellucian Resources:
• Upgrading to Banner 9 FAQ
• Ellucian functional and technical Webinars available in the E-Communities Search on: Student Administration Transformation
• Standard Documentation for Student 9.x apps
  • User guides
  • Handbooks
  • Release guides
  • Install guides
• Ellucian Services Course Catalog for various topics

Realize that this upgrade is not just a set of new administrative pages for the users.
This is a new framework for DBAs, Technical Staff and End-Users
Our Plan and Process

Our plan:
First in a test instance:
• Evaluate and Install ESM and Navigator
• Upgrade Luminis and Workflow
• Install the Admin pages
• Evaluate our custom INB forms for transformation
• Training/Testing
• Upgrade PROD to required levels and install ESM/Navigator
• Determine when to go-live and DO IT!
Our Plan and Process

Bring any attached systems up to required minimums
- Our General and Student modules were at the required levels
- We needed to upgrade Workflow and Luminis Portal

Install/test required software to support the Admin pages
- Ellucian Solution Manager – Required to install the Admin pages
- Application Navigator – New menu/framework for the Admin Pages/INB

Our Plan and Process

Evaluate and Install Ellucian Solution Manager (ESM) and Application Navigator

DBAs need to get comfortable with ESM
- Setup can take some time and effort
- ESM is the only supported method for installing the Administrative pages
- ESM can provide the DBAs with a consistent tool for installs and upgrades

Application Navigator is the new Framework for Banner.
- Provides a new ‘menu’ structure
- Search on page name/description
- Can display both Administrative pages AND INB forms
Note: the ‘Banner Transformed: Getting Started with Your Administrative Application’ document is specifically about how to use Navigator including the all important NEW keyboard equivalents.
Our Plan and Process

Application Navigator setups:
The Module/Form/Page to be used is set up on GUAPAGE and GUAOBJS
- GUAPAGE sets up the Modules and pages assigned to the module.
- The 'Integrated' flag lets the pages in the module to be used in Navigator.
- When you install the Admin pages for a module, a script is run to update the GUAPAGE records.

GUAPAGE has ‘Display Option’ column to determine under which system the Form/Page is displayed.
Options are:
- All (Banner 8 & Banner 9)
- Banner 8 Only
- Banner 9 Only
- Unified Menu All (Ban8&Ban9)
- Unified Menu Ban9 Only
## Our Plan and Process

<table>
<thead>
<tr>
<th>GUBOBS Display Option</th>
<th>In Application Navigator</th>
<th>Running Standalone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner8 Only</td>
<td>Banner 8.x version of the form is opened</td>
<td>N/A</td>
</tr>
<tr>
<td>Banner9 Only</td>
<td>Admin page is not included on the Unified Menu</td>
<td>A message is displayed in Banner 8.x the user is not authorized for access. The Banner 9.x Admin page is opened when the Admin application is in use.</td>
</tr>
<tr>
<td>All (Banner 8 &amp; Banner9)</td>
<td>The Banner 8.x version of the form is opened as this option is not Unified.</td>
<td>The Banner 8.x form is opened. The Banner 9.x Admin page is opened when the Admin application is in use.</td>
</tr>
</tbody>
</table>

## Our Plan and Process

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</tr>
</thead>
<tbody>
<tr>
<td>Unified Menu All (Ban8&amp;Ban9)</td>
<td>The Banner 9.x version of the Admin page is opened.</td>
<td>The Banner 8.x form is opened. The Banner 9.x Admin page is not included in the Banner 9.x menu</td>
</tr>
<tr>
<td>Unified Menu Ban9 Only</td>
<td>The Banner 9.x version of the Admin page is opened.</td>
<td>A message is displayed in banner 8.x that the use is not authorized for access. The Banner 9.x admin page is not included in the banner 9.x menu.</td>
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Our Plan and Process

We already had the ZK versions of the admin pages installed.

We installed and deployed Application Navigator to provide a single framework for our Banner system (General, Student, A/R, Financial Aid).

Our decision was to go with Application Navigator as the only access to Banner.

So for us the only settings that were used are:

• Banner 8 Only – The Banner 8.x version of the form in Navigator
• Unified Menu All (Ban8&Ban9) – The Banner 9.x version of the admin page is opened in Navigator

The advantage to this is that if a critical defect/navigation error is found in a transformed Admin Page.

Reset the GUAOBS value back to ‘Banner 8 Only’ and you get the INB form displayed.

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Reset the GUAOBS value back to ‘Banner 8 Only’ and you get the INB form displayed.

For Example, SOACTRL after implementation has a GUAOBS display setting of ‘Unified Menu All (Ban8&Ban9)’:
Our Plan and Process

So the Admin Page displays by default:

If you discovered a serious issue with performance/operation of this page, You can reset the GUAOBS option back to ‘Banner 8 Only’

And then the INB version will display:
Our Plan and Process

Training/Documentation:
The Ellucian Document:
Banner Transformed: Getting Started with Your Administrative Applications
Contains the basic navigation information for the new pages (see Keyboard shortcuts pg 16-18)
We created our own versions of the documentation for:
• Application Navigator
• Administrative Pages
• Keyboard Shortcuts
Documentation was done in both paper and ‘how-to videos’
Our Plan and Process

Notification Center:

The notification bar will display all error messages related to a current process. Some error messages will be displayed immediately (invalid code), others will display when a save is attempted.

The Notification center will “track” all errors until they are resolved with a save.

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**Our Plan and Process**

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**Banner XE Navigation**

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**Enterprise Resource Planning Technologies**

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**Banner XE Keyboards Equivalences:**

<table>
<thead>
<tr>
<th>Function/Button</th>
<th>Banner XE</th>
<th>Banner INB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Access / 'Go To'</td>
<td>Alt + G</td>
<td>Ctrl + Pagedown</td>
</tr>
<tr>
<td>Go (next block from Key block)</td>
<td>Shift + F3</td>
<td>Shift + F7</td>
</tr>
<tr>
<td>Start Over (clear form roll back)</td>
<td>Shift + F2</td>
<td>Shift + F7</td>
</tr>
<tr>
<td>Copy Term</td>
<td>Alt + C</td>
<td>Maintenance Button</td>
</tr>
<tr>
<td>End Term</td>
<td>Alt + X</td>
<td>Maintenance Button</td>
</tr>
<tr>
<td>Copy Record/Section</td>
<td>Shift + F6</td>
<td>Insert Record/Duplicate Record</td>
</tr>
<tr>
<td>Insert Record</td>
<td>Shift + F4</td>
<td>F6</td>
</tr>
<tr>
<td>Delete Record</td>
<td>Shift + F5</td>
<td>Shift + F6</td>
</tr>
<tr>
<td>Save</td>
<td>Shift + F10</td>
<td>F10</td>
</tr>
<tr>
<td>List of Values (LOV)</td>
<td>F9</td>
<td>F9</td>
</tr>
<tr>
<td>Filter (Enter Query)</td>
<td>Shift + F7</td>
<td>F7</td>
</tr>
</tbody>
</table>
Our Plan and Process

After MANY training/walk-through sessions and having the Admin pages in our DEV environment.

- Load the Administrative pages to Production:
- Change all links to Banner INB to point to Navigator
- Message the INB users to change any saved URLs to Navigator

You are LIVE!

Topic #4

Lessons Learned
Lessons Learned

• Getting Ellucian Solution Manager (ESM) setup can take some time.
• If possible, load Application Navigator first as the initial change.
• Be sure that you provide time for the end users to ‘play’ with the Administrative pages.
• THERE WILL BE WHINING.
• Try to highlight the new filter/search and navigation options to the users.
• Remember that you can always revert a page back to INB if necessary.

Questions & answers
Thank you

We want to hear from you—feedback survey
Access session surveys by using the survey widget on the mobile app or by logging into your session schedule builder.

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Session ID 97146