

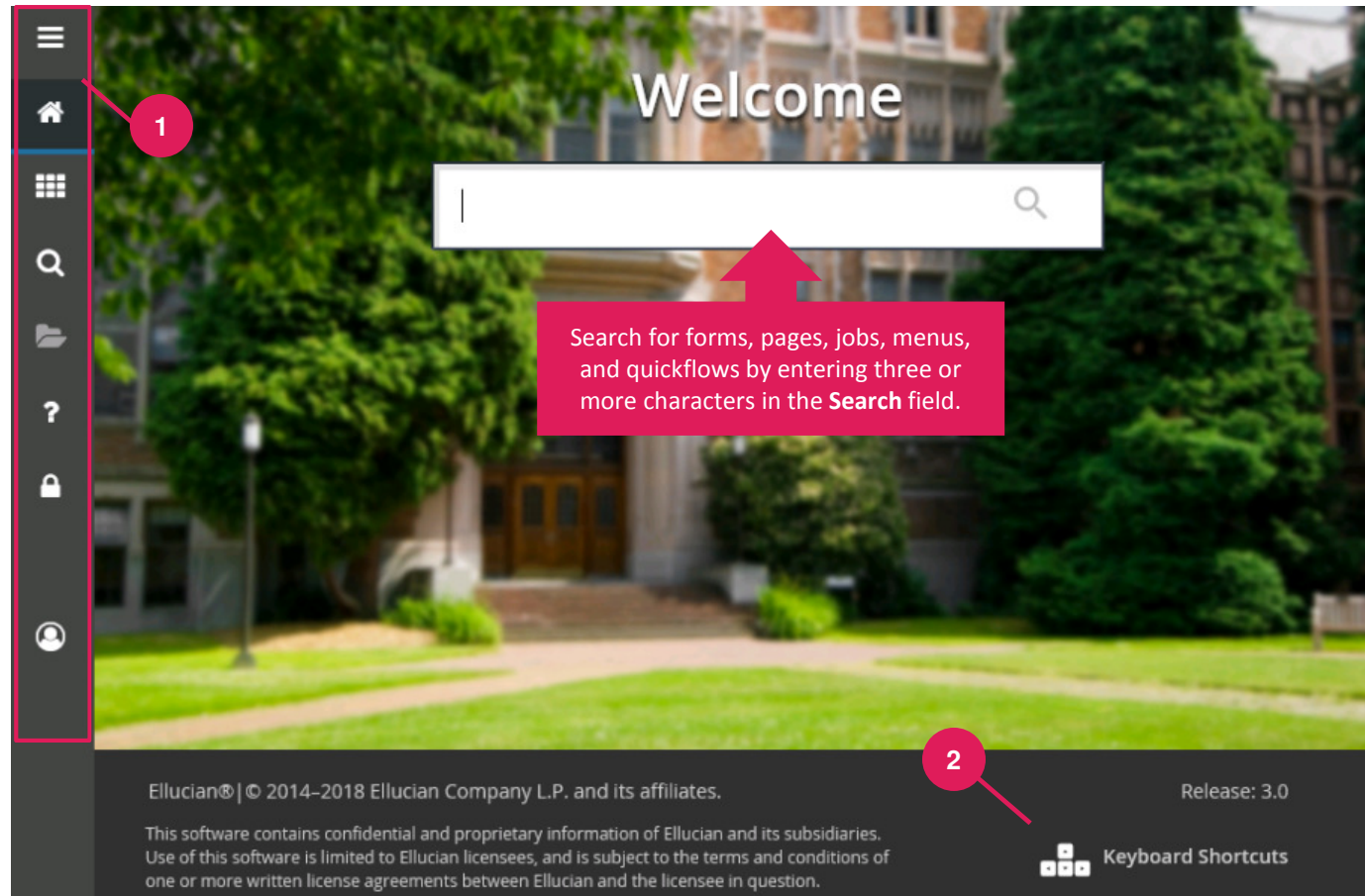
Accessing Banner

Log on using your unique **User Name** and **Password**.

1) About the Landing Page

The always present unified menu panel gives you access to the:

- **Menu** icon: Toggle to display or hide the icon names.
- **Dashboard** icon: Click to return to the Landing Page from any page.
- **Applications** icon: View Banner, My Banner, and Banner Self-Service menus and select pages.
- **Search** icon: Find pages or forms using key words or the seven letter identifier. *Results display after entering three characters.*
- **Recently Opened** icon: View a list of recently opened pages and forms. The number on the folder shows a count of opened pages.
- **Help** icon: View online help for Banner 9 administrative applications. *The Help icon is active only when a page is open.*
- **Sign Out** icon: Click to log out of the application.



2) Viewing Keyboard Shortcuts

Click the link to see a list of keyboard shortcuts used to navigate the landing page. With the exception of **Sign Out**, use these keyboard shortcuts like a toggle switch to open and close the specific page element.

Display Applications: Ctrl+M

Display Recently Opened Items: Ctrl+Y

Display Dashboard: Ctrl+Shift+X

Help: Ctrl+Shift+L

Search: Ctrl+Shift+Y

Sign Out: Ctrl+Shift+F

1) Key Block and Page Header

Only the page's key block displays initially. Enter required information, then click **Go** to activate the page.

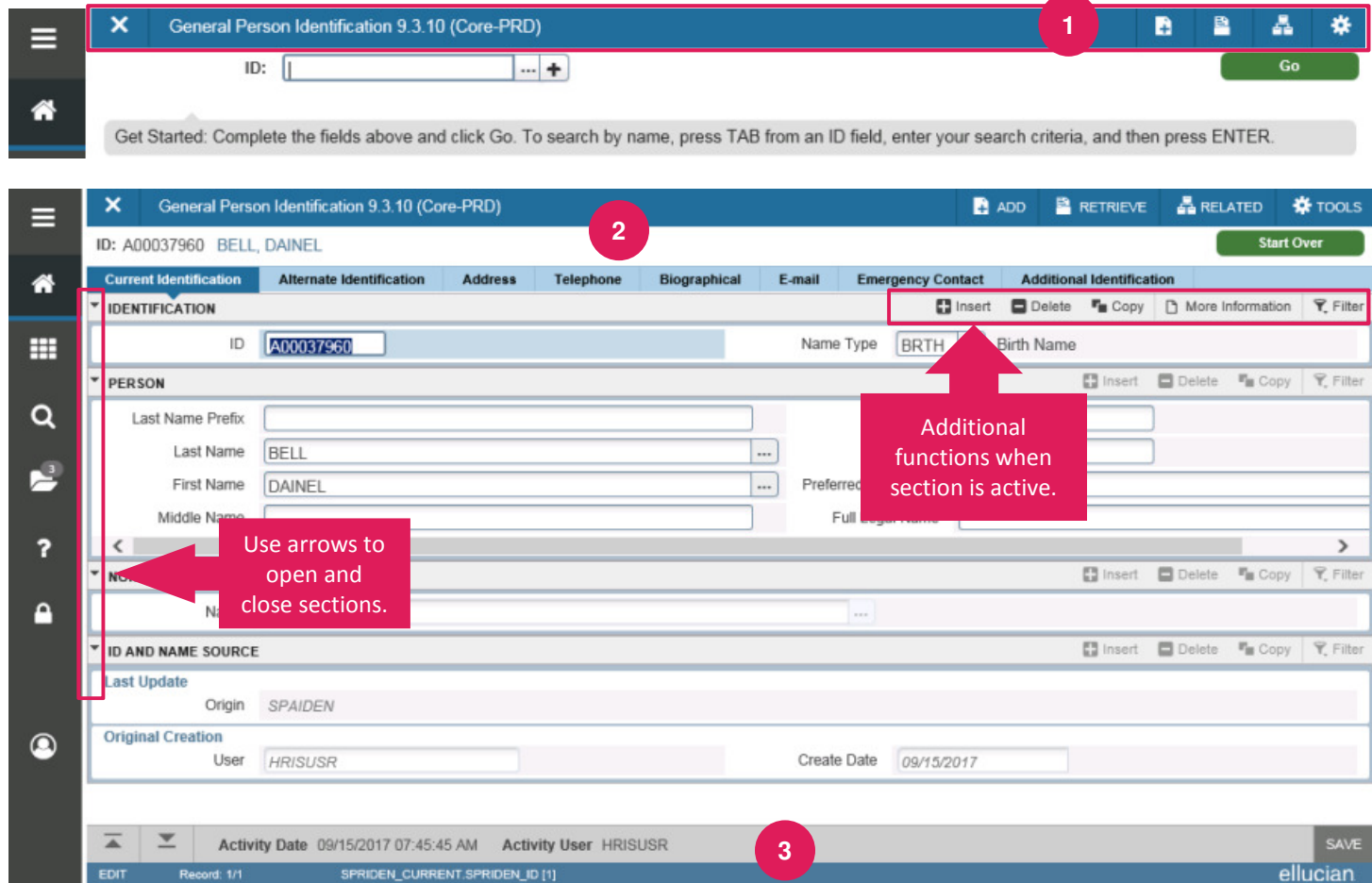
The page header provides easy access to key functions including:

- **X** icon: Close the page
- **ADD / RETRIEVE** icons: Used with Banner Document Management.
- **RELATED** icon: Displays a list of pages related to the open page. Select from the list or **Search** for a specific page.
- **TOOLS** icon: Perform standard actions and options for the page currently displayed (formerly the **Options** menu in Banner 8.)

2) Page Elements

The key block collapses and **Go** is replaced with **Start Over** (formerly **Rollback** in Banner 8).

- **Tabs**: Organize information by content area. Tabs are active unless grayed out.
- **Sections**: Known as blocks in Banner 8, sections (denoted by gray bars) provide details about the ID/Code in the key block. When active, actions such as **Insert**, **Delete**, **Copy**, and **Filter** can be performed. *Note: If Supplemental Data Engine is enabled, a **More Information** icon displays.*



3) Page Footer

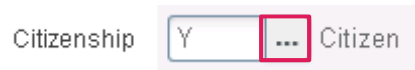
The page footer provides access to additional navigation tools and information.

- **Next Section / Previous Section** icons: Known as **Previous Block** or **Next Block** in Banner 8, use these icons to move between sections or tabs on a page.
- **Save** icon: A major difference between Banner 8 and Banner 9, the **Save** button is located at the bottom of the page.
- **Record Count**: Indicates the number of records displayed.
- **Table/Field Name**: Displays at the very bottom of the page for quick reference.

Performing a Lookup

The **Lookup** icon allows you to quickly search for a value for a field. Note that not all fields have **Lookup** icons.

1. Click the **Lookup** icon in the selected field.



2. A list of values displays. To narrow the results, type a value in the **Criteria** field, then press **Enter**.
3. To return a value to the selected field, highlight the correct value and click **OK**. Or, double-click on the correct value to return it to the field.

Citizen Type Validation (STVCITZ)

Criteria

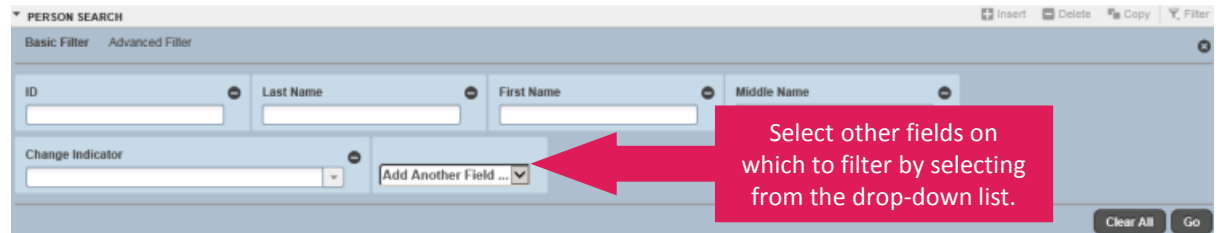
Code	Desc	Citizen
EL	Eligible Citizenxxxxxxxxxxxx	N
N	Non-Citizen	N
NR	Nonresident Alien	N
RA	Resident Alien	N
WW	Worldwide	N
Y	Citizen	Y

Filtering Data

You can query data in a section by clicking the active **Filter** icon in the section header. Note that in some cases, when you click the **Lookup** icon, you will be presented with the Filter window as well. There are two filter types: Basic and Advanced.

Basic Filter (default): Use the **Basic Filter** to specify search criteria using pre-defined search fields.

1. In the fields that display, enter or select a value for each field on which you want to search. *To return all records in the system, just click **Go** without entering any filter criteria. You may add basic operators when entering data in text fields (see below).*
2. Click **Go** to display the results.
3. Click the **Filter Again** button (on the **Search Results** window) to further refine your search.



Notes

- Remove search fields by clicking the **Minus Sign** icon associated with the field or click the **Clear All** button.
- Add search fields by selecting from the **Add Another Field** drop-down list.
- Add operators, or wildcards, when entering values into text fields. If you enter operators here and click the **Advanced Filter** link, the operators are retained. This works in reverse as well: Enter operators on the **Advanced Filter** window and click the **Basic Filter** link and all operators are retained.

Sample Operator Conventions

Basic Operator	Advanced Operator
%D%	Contains
D%	Starts with
%D	Ends with

Filtering Data, continued

Advanced Filter: Use the **Advanced Filter** to specify filter data using SQ type operators.

- For each field on which you want to search, click the **Operator** drop-down arrow and select the appropriate operator. *The available operators depend on the type of field selected (numeric, alphanumeric, date, check box, or other).*
- Enter a value for the field you selected (in the blank field to the right of the **Operator** field).
- Repeat steps 1 – 3 until all filter criteria are entered.
- Click **Go** to display the results.
- Click the **Filter Again** button (on the **Search Results** window) to refine your search results.

Notes

- Remove search fields by clicking the **Minus Sign** icon associated with the field or click the **Clear All** button.
- Add search fields by selecting from the **Add Another Field** drop-down list.
- If you enter operators here and click the **Basic Filter** link, the operators are retained. This works in reverse as well.

Searching for an Person

Provided you know the name of the person, there is another person search option.

- Click in the **ID** field and press **Tab** on your keyboard.
- In the blank field that displays, enter the person's last name. Press **Tab** again.
- The **ID and Name Extended Search** window displays. *You can narrow your search results by entering additional information in the fields provided.*
- Click the **Press to See Results** button.
- Select the correct record, then click **OK**.

About QuickFlows

QuickFlows are groups of forms or pages that launch in a specific order. You can define the name of the QuickFlow, the pages to include, and the order in which they should open.

At this time, the pages used in a QuickFlow must be of a single technology type (either Banner 8 INB or Banner 9 Administrative Application with a platform type of ADMJF). Otherwise, the QuickFlow will not execute properly.

The **Search** field on the Landing Page has been modified so that you can search for and access QuickFlows.



Process for Creating a QuickFlow

Naming a QuickFlow

1. Access the QuickFlow Code Validation page (GTVQUIK).
2. Click **Insert** to create a blank record.
3. Enter a **Code** name for your QuickFlow.
4. Enter a **Description**.
5. Click **Save**.

Adding Pages to a QuickFlow

1. Access the QuickFlow Definition page (GUAQUIK).
2. Enter the **QuickFlow** code, then click **Go**.
3. Enter the seven-letter page identifier in the **Current Form** field. *Enter the pages in the order you want them to display.*
4. Repeat step 3 until all pages required for the QuickFlow are entered.
5. Click **Save**.

Available Form *	Available Form Description
**API_PERSONS	Use for Data Model Masking
**SSB_MASKING	Use for SSB Masking ONLY - Only special p...
60TEST	test
AAAACKN	Dues Acknowledgement
AAAACKR	Dues Acknowledgement Rules
AAAADJS	Dues Adjustment
AAACMEM	Co-Member
AAADINS	Dues Installment
AAADUES	Dues Entry

Current Form *	Current Form Description
SPAIDEN	General Person Identification
SAAADMS	Admissions Application