

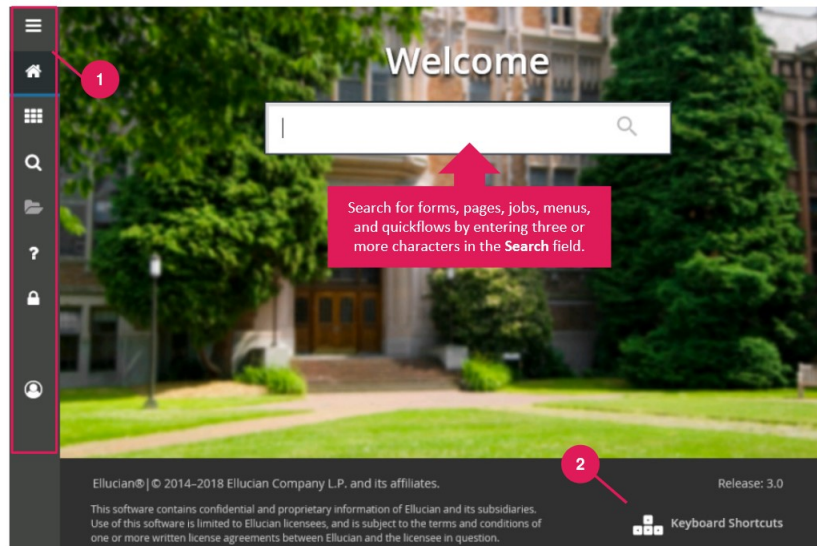
Accessing Banner

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

Getting Started with Banner 9: Navigating Pages

Quick Reference Guide

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.*

The screenshot shows the Banner 9 interface for General Person Identification. The page is divided into sections: IDENTIFICATION, PERSON, and ID AND NAME SOURCE. The IDENTIFICATION section is active, showing fields for ID (A00037960), Name Type (BRTH), and Birth Name. The PERSON section shows fields for Last Name (BELL), First Name (DAINEL), and Middle Name. The ID AND NAME SOURCE section shows fields for Last Update, Origin (SPAIDEN), Original Creation User (HRISUSR), and Create Date (09/15/2017). The page footer shows Activity Date (09/15/2017 07:45:45 AM), Activity User (HRISUSR), and Record Count (1/1). Red callouts highlight the 'Go' button (1), the 'Start Over' button (2), and the 'Save' button (3). A red arrow points to the 'Additional functions when section is active' (Insert, Delete, Copy, More Information, Filter) and another points to the 'Use arrows to open and close sections' (left and right arrows).

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.

Getting Started with Banner 9: Searching for and Filtering Data

Quick Reference Guide

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 Citizen.....	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.



Select other fields on which to filter by selecting from the drop-down list.

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

Getting Started with Banner 9: Searching for and Filtering Data

Quick Reference Guide

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**.

Getting Started with Banner 9: Creating QuickFlows

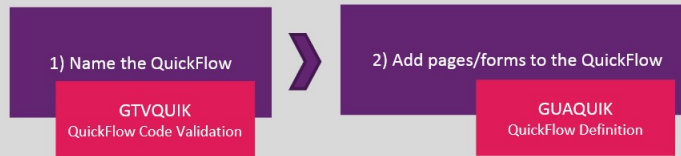
Quick Reference Guide

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**.

