Access Banner

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

**About the Landing Page**

The sticky unified Menu Panel gives access to these icons.

- **Menu**: Display or hide the icon names.
- **Dashboard**: Return to the Landing Page from any page.
- **Applications**: View Banner, My Banner, and Banner Self-Service menus and select pages.
- **Search**: Find pages or forms using key words or the seven-letter object identifier. Results display after entering three characters.
- **Recently Opened**: View a list of recently opened pages and forms. The number on the folder shows a count of recently opened pages.
- **Help**: View online help and keyboard shortcuts for Banner. The **Help** icon is active only when a page is open.
- **Favorites**: Access links to the pages that you visit most frequently.
- **Sign Out**: Log out of Banner.
- **User Profile**: View the name of the user currently logged into the system.
View Keyboard Shortcuts

- Click the Help icon, then click Application Navigator Keyboard Shortcuts to view 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 elements.

Key Block and Page Header

Only the page’s Key Block displays initially. Enter the required information, then click Go to activate the page. The Page Header provides easy access to the following functions.

- X: Close or exit the page.
- ADD / RETRIEVE: Used with Banner Document Management.
- RELATED: View a list of pages related to the active page. To access a related page, select from the list or use the Search field.
- TOOLS: Perform standard actions and options for the page currently displayed.
Page Elements

When the page is activated, the key block collapses and Go is replaced with Start Over.

A page is organized as follows:

- **Tabs**: Organize information by content area. Tabs are active unless grayed out.
- **Sections**: Provide detailed information related to the information in the Key Block. When active, actions such as Insert, Delete, Copy, and Filter can be performed.

  **Note**: If Supplemental Data Engine is enabled, the More Information icon displays.

Page Footer

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

- **Next Section / Previous Section** icons: Move between sections or tabs.
- **Save** icon: Capture new and updated information to the database.
- **Record Count**: Indicates the number of records displayed.
- **Table/Field Name**: Displays at the bottom of the page for quick reference.
Perform a Lookup/Search

The **Search** or **Lookup** icons allow you to quickly search for a value for a field. **Note**: 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, select the correct value and click **OK**. Or, double-click the correct value.

Filter Data

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

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

1. Enter a value for each field on which you want to search, then click **Go** to return all records in the system.
2. Click the **Filter Again** button (on the **Search Results** window) to further refine your search.
Note:

- Remove search fields by clicking the Minus Sign icon associated with the field, or click Clear All.
- 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.

Advanced Filter: Used to specify filter data using SQL type operators.
1. For each field on which you want to search, click the Operator dropdown arrow and select the appropriate operator.
   Note: The available operators depend on the type of field selected (numeric, alphanumeric, date, check box, or other).
2. Enter a value in the blank field to the right of the Operator field.
3. Repeat steps 1–2 until all filter criteria are entered.
4. Click Go to display the results.
5. Click Filter Again (on the Search Results window) to refine search results.

Sample Operator Conventions

<table>
<thead>
<tr>
<th>Basic Operator</th>
<th>Advanced Operator</th>
</tr>
</thead>
<tbody>
<tr>
<td>%D%</td>
<td>Contains</td>
</tr>
<tr>
<td>D%</td>
<td>Starts with</td>
</tr>
<tr>
<td>%D</td>
<td>Ends with</td>
</tr>
</tbody>
</table>
Note:

- Remove search fields by clicking the **Minus Sign** icon associated with the field, or click **Clear All**.
- 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 **Basic Filter** link, the operators are retained. This works in reverse as well.

**Search for a Person**

If you know the person’s name, you can use the following search option.

1. Click the **ID** field, then press **Tab**.
2. In the blank field that displays, enter the person’s last name. Press **Tab** again.
3. The **ID and Name Extended Search** window displays. You can narrow your search results by entering additional information in the fields provided.
4. Click **Press to See Results**.
5. 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 (for example, 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.

Name a Quickflow

1. Access the QuickFlow Code Validation page.
2. Click Insert to create a blank record.
3. Enter a Code name for your QuickFlow.
4. Enter a description.
5. Click Save.
Add Pages to a QuickFlow

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