

Banner Student – Navigate Banner 9

Quick Reference Guide

Access Banner

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

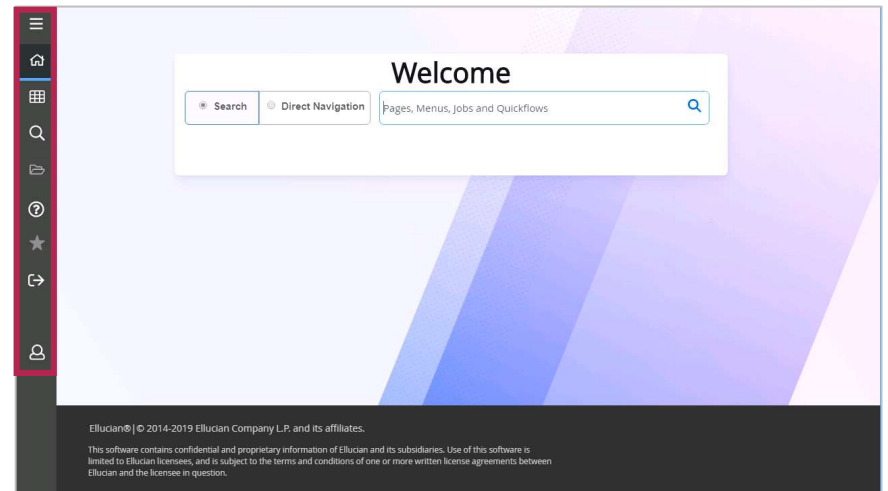
About the Landing Page

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.



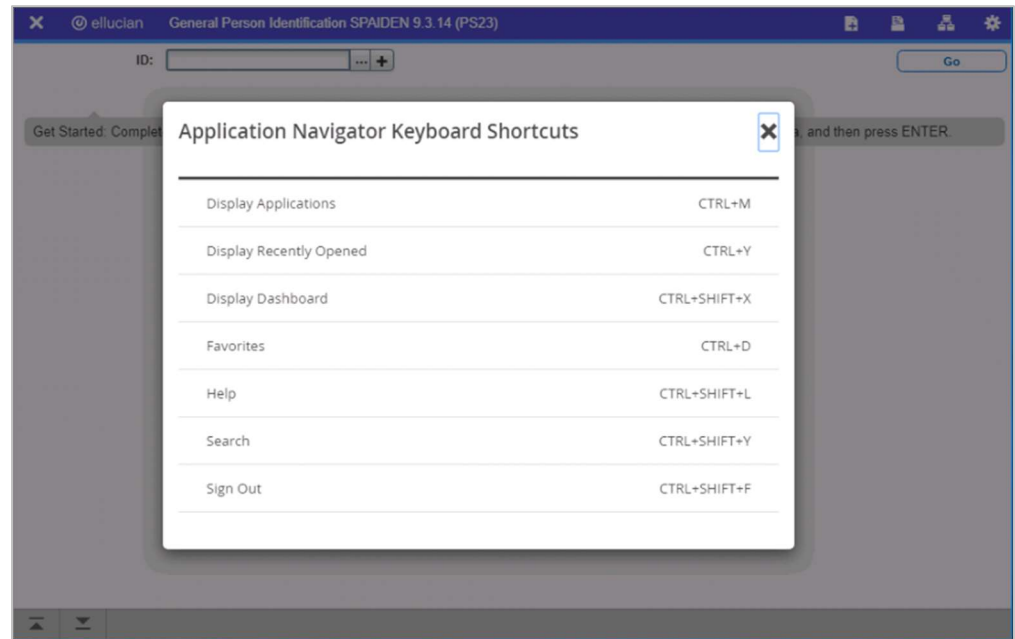
The login form features the 'ellucian' logo in the top left and a 'Change Your Password' link in the top right. Below the logo is a dark purple header bar. The main content area is white and contains the text 'Sign in to your account'. There are two input fields: 'User Name' and 'Password', followed by a 'Sign In' button.



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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.

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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.

The screenshot displays the Banner Student interface for a person identification record. The browser title is "General Person Identification SPAIDEN 9.3.14 (PS23)". The record ID is N00048493 for Peggy Trafford. The interface features a top navigation bar with tabs for "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "E-mail", "Emergency Contact", and "Additional Identification". A left sidebar contains navigation icons. The main content area is divided into sections: "IDENTIFICATION" (with ID and Name Type fields), "PERSON" (with Last Name, First Name, Middle Name, Prefix, Suffix, Preferred First Name, and Full Legal Name fields), "NON-PERSON" (with Name field), and "ID AND NAME SOURCE" (with Origin, Original Creation, User, and Create Date fields). A bottom status bar shows "Activity Date: 02/17/2020 12:04:43 AM", "Activity User: LBROWN", and a "SAVE" button. The footer includes "EDIT Record: 1/1 SPRIDEN_CURRENT.SPRIDEN_NTYP_C..." and "©2000 - 2020 Ellucian. All rights reserved. ellucian."

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.

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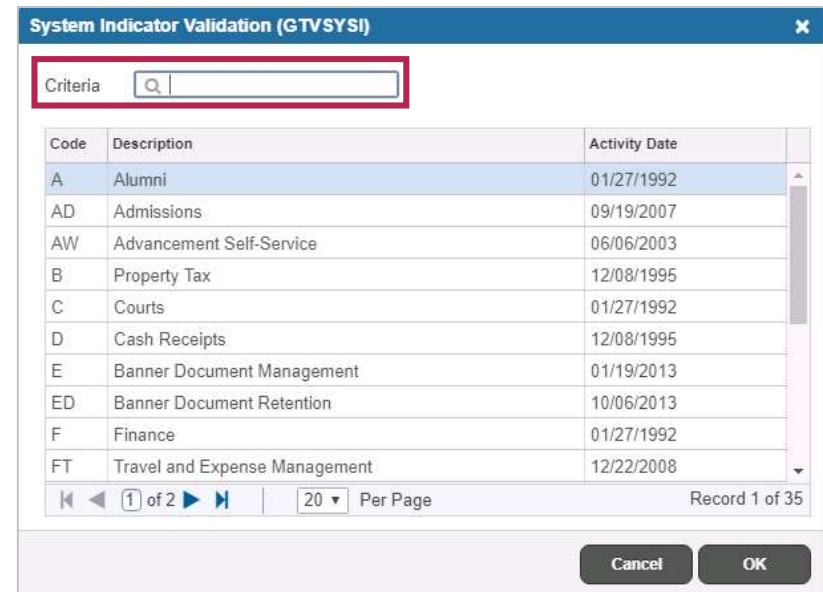
Perform a Lookup/Search

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.



Code	Description	Activity Date
A	Alumni	01/27/1992
AD	Admissions	09/19/2007
AW	Advancement Self-Service	06/06/2003
B	Property Tax	12/08/1995
C	Courts	01/27/1992
D	Cash Receipts	12/08/1995
E	Banner Document Management	01/19/2013
ED	Banner Document Retention	10/06/2013
F	Finance	01/27/1992
FT	Travel and Expense Management	12/22/2008

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.

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PROCESS MAINTENANCE

Settings Insert Delete Copy Filter

Basic Filter Advanced Filter

Process Title System Description

Type Add Another Field ...

Clear All Go

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.

- 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).
- Enter a value in the blank field to the right of the **Operator** field.
- Repeat steps 1–2 until all filter criteria are entered.
- Click **Go** to display the results.
- Click **Filter Again** (on the **Search Results** window) to refine search results.

Sample Operator Conventions

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

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PROCESS MAINTENANCE

Settings Insert Delete Copy Filter

Basic Filter **Advanced Filter**

Process Equals

Title Equals

System Equals

Description Equals

Type Equals

Add Another Field ...

Clear All Go

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**.

ID and Name Extended Search

Search Detail

Press To See Results

Person/Non-Person Count 3

Person Search Detail

Non-Person Search Detail

Reduce Search By

Group Type Person Non-Person Both

City

State or Province

ZIP or Postal Code

Name Type

Birth Date

Gender

Press Enter Query or select button to clear search.

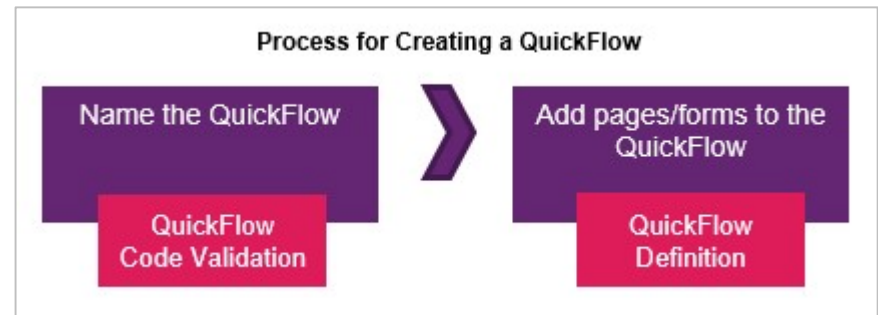
Enter search criteria then press Execute Query or select button to reduce search.

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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**.

Code *	Description *
1099	1099-R Set Up
A1	Prerequisite
AA	Quick Build Faculty Member
ABIO	Alumni Quick Bio Update
ADD	Adding Records to System
ADDSTU	Add Student
ADM	Admissions List
ADMISSIONS	Admissions Mgt Domestic/Intern
ADMR	Define Applicant Codes
ADV	Advancement Sample
ADVR	Advising Quickflow
AFRP	Admit, FA, Reg, Pay
AHR	Define Grade Processing Rules
ALUM	Show Alumni & Development
ANTY	Gift Annuity Process
APE	Process Applicant
APL	Applicant Processing

Record 2 of 271

SAVE

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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**.

