BANNER 9

NAVIGATION GUIDE for INB (Internet Native Banner) Administrative & Functional Access

Banner 9

Banner 9, according to Ellu

You can then use any of the following to navigate within the Welcome Screen:

Menu icon (CTRL+M) – The Menu icon is located in the upper left corner of the application. Click on this icon to open the Banner Menu. Find the page you are interested in opening. Select the desired entry and click Enter. The Menu icon will also allow you to open the My Banner menu which will allow you to create a personal list of pages that you use regularly. See the appendix for directions regarding how to set up My Banner.

Search icon (CTRL+Shift+Y) – The Search icon is located in the upper left corner, just to the right of the Menu icon. Click on this icon to open the Search window. You can then enter either the descriptive name of the page or the Banner acronym for the page.

Recently Opened icon (CTRL+Y) – The Recently Opened icon is located in the upper left corner, just to the right of the Search icon. It is displayed with a count of pages after you have opened the first page in an application. Open the list and select a page to access it.

Search box in the center of the page (CTRL+Home) – In this box, you can enter either the descriptive name of the page or the Banner acronym for the page. Find the desired entry and click Enter.

You can return to the M8T6002972eW*nQ6G3(v)-V/*nBG3(v)-V/*nBGt]TITBG3-(4)-(2h)(at y)(3)-(3u)(4)-(2u)(4)(5)(e)-(4)(5egu)(4ar)(y

Basic Navigation

The basic navigation of each page (previously called Forms) includes the page header, key block, sections, notification center, and buttons.
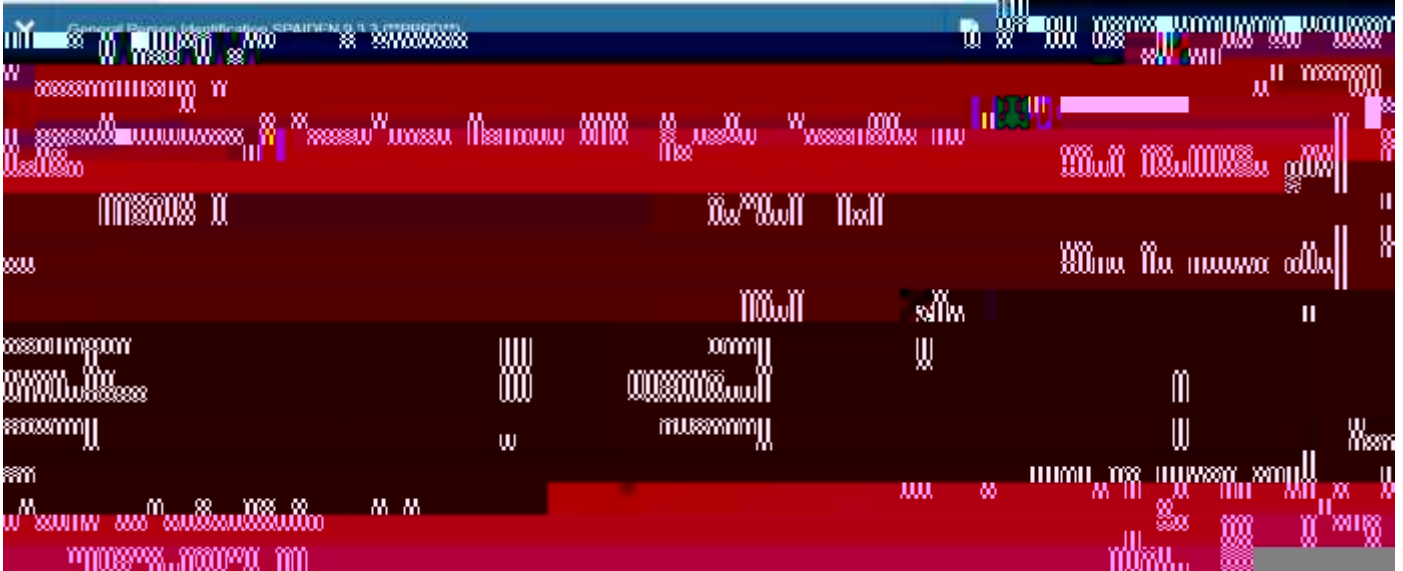
Page Header

The page header is part of the basic navigation and contains the following items:

Page close icon "X" – Always use this icon to close your page.
Page title – Includes description, acronym, version, and database.
Add and Retrieve icons – These icons are used with Banner Document Management (Xtender).
Release and Submit buttons – Displayed only with a workflow.
Related Menu button – Displays a list of pages that can be accessed from this page.
Tools Menu – Will include refresh, export, print, clear record, clear data, item prop4( )7lea7u0e2(p)4,(ata, ite3(c

Key Block

The first block on most pages contains key information. The key block determines what data is entered or displayed on the rest of the page. All the information on the page is related to the key block. The key block stays on the page as subsequent sections are displayed.

When the cursor is in the key block, the fields that can be entered in the key block are enabled. When you leave the key block, the fields in the key block are disabled.

When the cursor is in the key block, the information is displayed in a column format. When you leave the key block by clicking the Go (previously Next Block) button, the data is rearranged into a linear format and not enterable.

To access the body of the page, populate the key block data and then click Go.

You can return to the key block if you are in the body of a page by clicking Start Over (previously Rollback).

Sections

Bottom Section Navigation

Previous Section   Next Section   Save
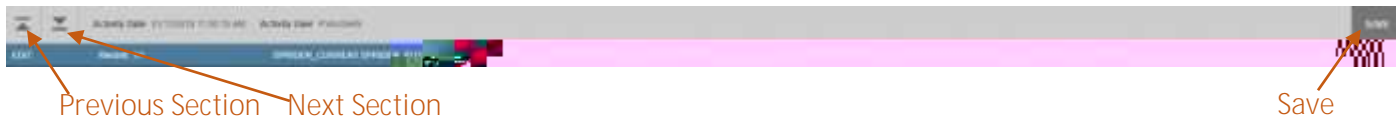
The bottom of the section of the page will contain icons to be used for navigation, perform functions, and display additional information.

- Previous Section button – Will take you backwards in the sections (Alt+ Page Up).
- Next Section button – Will take you to the next section of the page (Alt+ Page Down).
- Activity Date – Current system time. This would be the time stamped for the record if created or modified.
- Activity User – Name of account user creating or modifying the record.
- Save button – This the button you will use to save your data. **Error Message Types**

Notification

Data Display Options

Required Fields

An asterisk (*) displayed next to a field name indicates that the field requires a value before you continue on the page. The system uses the definition of the field as it is used in the application to determine if it is required. For fields that have conditional logic that determines whether they are required, the asterisk (*) is not displayed. If you leave a section or a page without entering information in a required field, the page notifies the individual in the Notification Center, requiring the user to perform some additional action.

Sort Order

In a grid layout, values for a field can be sorted; and, if you have chosen to sort the data, an up or down arrow next to the field name indicates the current sort order for the field. You can click the field label to reverse the sort order.

Dates

You can either enter the date directly or use the calendar icon for date selection. The date format is mmddyyyy. To enter the current date, type any letter and [TAB].

Lookup

The Lookup feature allows you to quickly find a value for a field. The Lookup button next to a field indicates that the field has the Lookup feature.

Click the Lookup button (...), enter a filter value, and press Enter to display results that match the filter criteria. Select a value and click OK, or double-click a value to return the value to the calling page.

In addition, when you are in the key block and all you see is the id field, you can press the tab key and this will allow you to enter a name search.

Filtering Data

You can filter data in a section if there is an active Filter icon in the section header. Use the following steps to filter data in a section.

> 1. Click the active Filter (F7) icon for the section.

2. Choose the field you want to filter from the Add Another Field drop down list.


3. Choose an operator from the Contains drop down list. The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other).

The Contains operator is available for alphanumeric and other fields only. The Between operator includes the values entered. For example, for codes "between" 1 and 5, the values 1, 2, 3, 4, and 5 are considered. Required fields do not use the Is Null and Is Not Null operators.
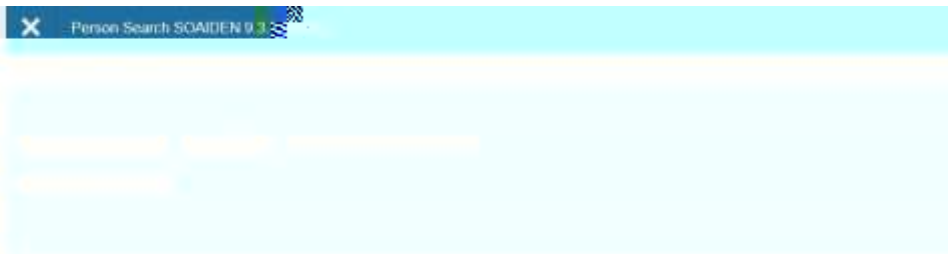

4. Enter a value for the field you selected.
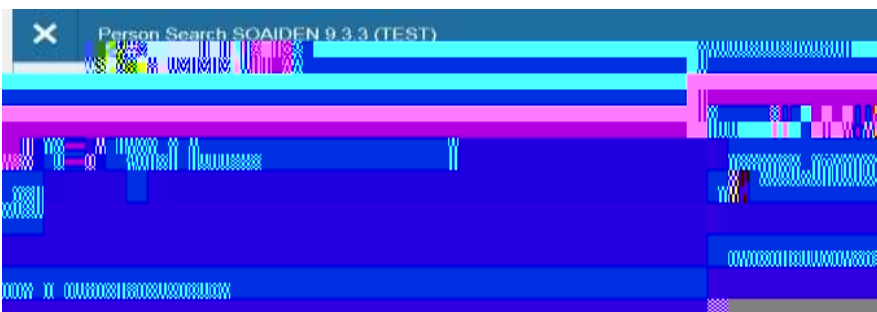
5. Optional: If you want to add another field to the filter criteria, choose a field from the Add Another Field dropdown, select an operator, and enter a value for the field that you selected. Repeat this step until all filter criteria are entered.

6. When all filter criteria are entered, click Go (F8) to display the filter results. The number of records retrieved is displayed at the bottom of the section. The results for a field can be sorted in
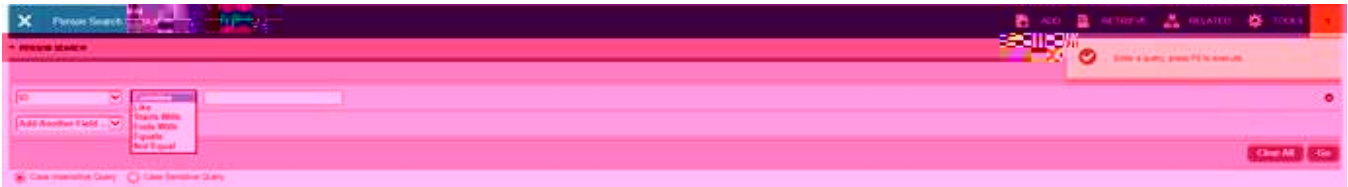
5. Add any additional filters if any additional information is known. Select Go button.
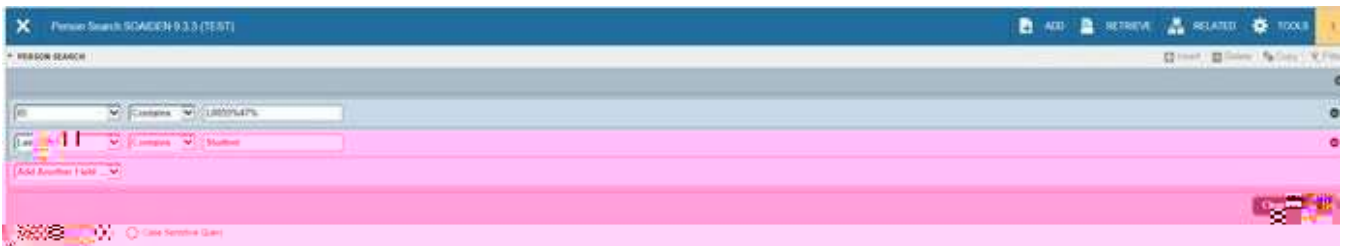
6. You will be provided a list of compatible information and may either highlight the information and use the Select button from the lower right of the form or select Cancel.
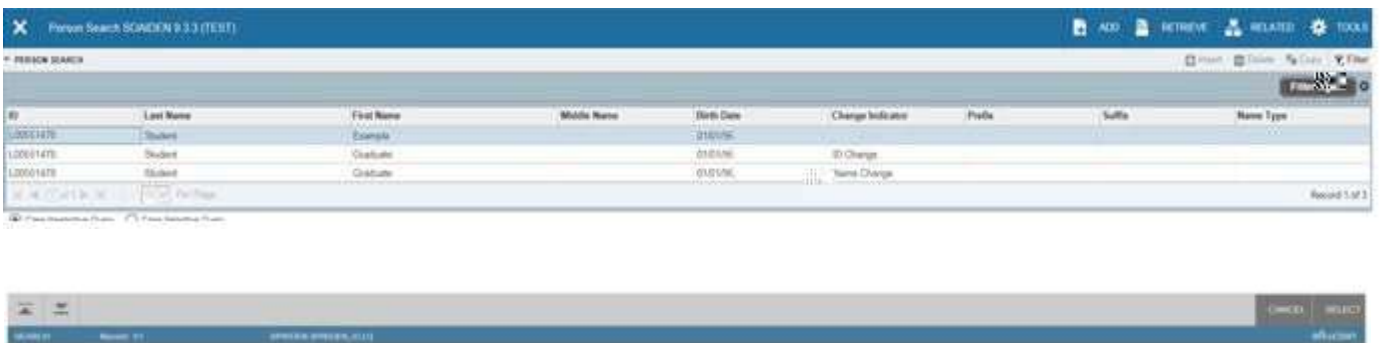
Advanced Features

Item Properties

Item Properties lists all properties for the field where the cursor is currently located.

Item properties include the field's internal database name, whether the field is required, type of data (character or numeric), maximum length, and other characteristics of the field. The specific properties that are displayed depend on the type of field. To display Item Properties for a field, place the cursor in the field and select Tools > Item Properties.

Banner Keyboard Shortcuts

Action	Banner 9 Keystroke	Banner 8 Keystroke
Cancel Page, Close Current		
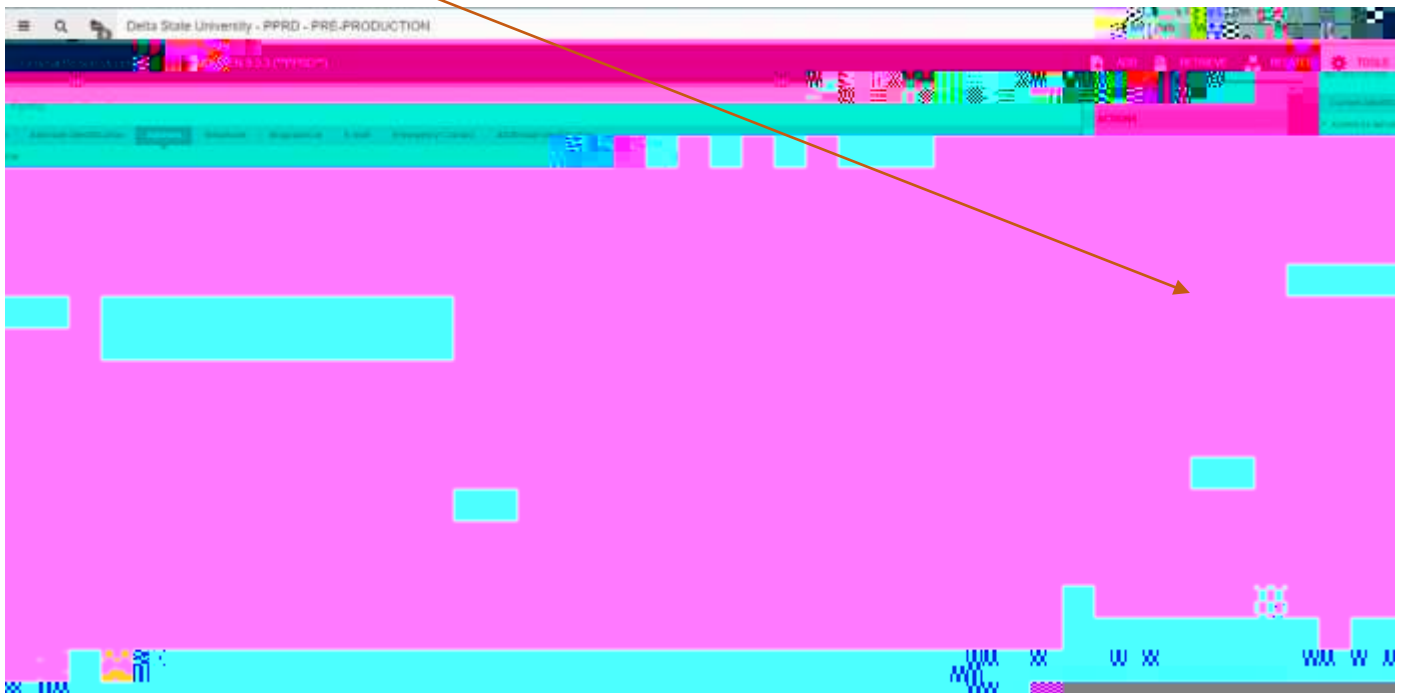
My Banner Personal Menu

You may create a personal menu tied to your Banner user ID. Your personal menu will contain the pages, jobs, menus, and quickflows that are most important in your daily work. Once the personal menu is created, you may access it from the main menu.

1. From the Banner 9 Welcome Page page, use either the search box in the middle of the screen or the search icon to enter either "My Banner" or "GUAPMNU".

2. The My Banner maintenance page contains:
   Type: A drop down menu located at the top of the screen to allow you to choose from Banner Pages, Job Submissions, Menus, Menu Messages, and Workflows to access all forms needed to customize your My Banner.
   Object Type: All available pages, jobs, menus, or quickflows associated with the chosen type

3. To add objects to your personal menu, select the name from the left pane by double-clicking it and then use the Insert buttons in the middle of screen to add to the right pane.

4. After each page selection to the right pane, select Save in the bottom right hand corner to retain selections.

My Banner Maintenance GUAPMNU 9.0 (**PPRD**)