### 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.
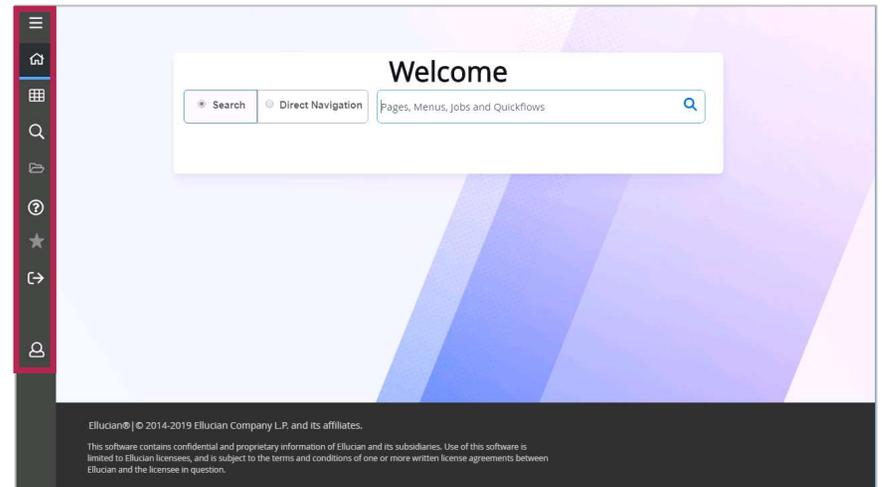
## View Keyboard Shortcuts

- 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.
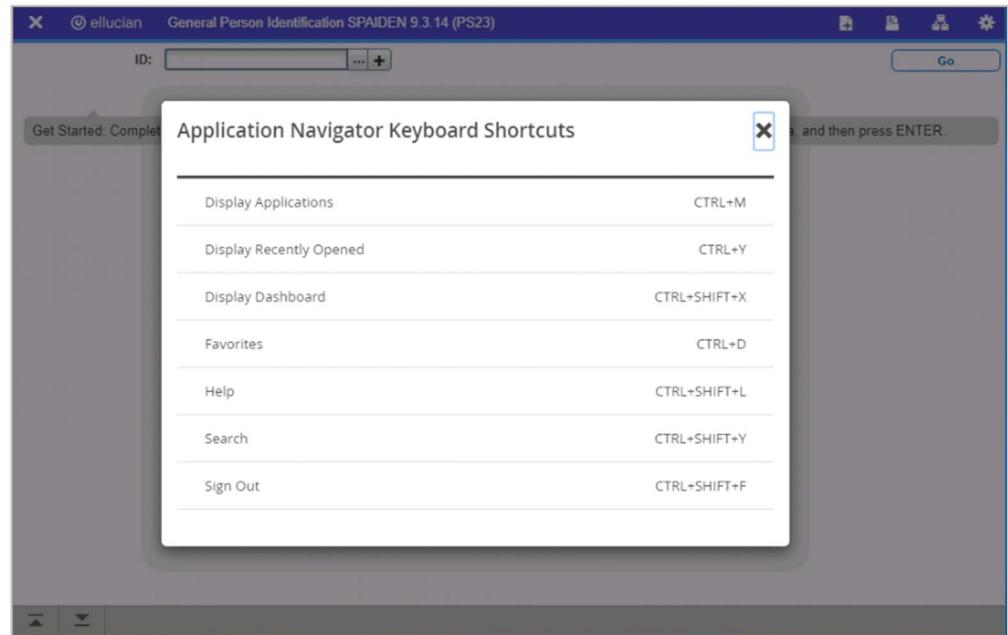


## Key Block and Page Header

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.

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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.



## 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.
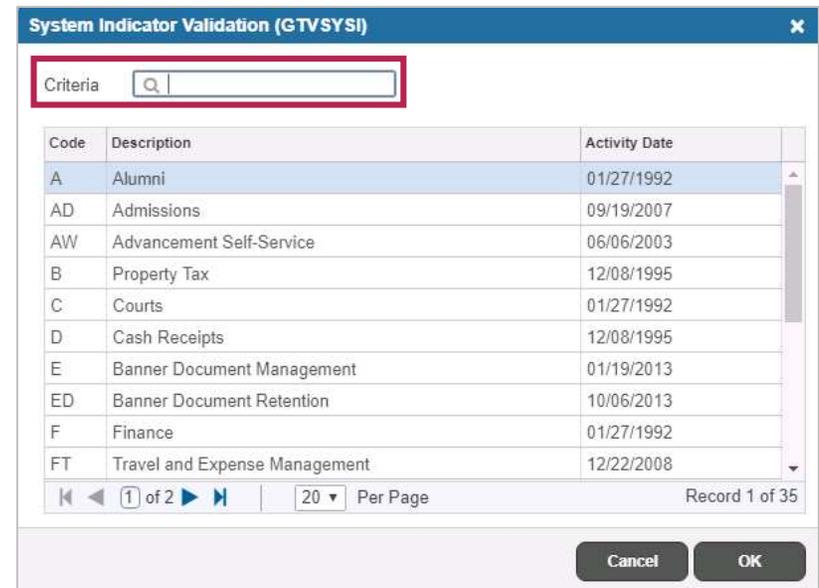- **Table**/**Field Name**: Displays at the bottom of the page for quick reference.

### 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.

**Sample Operator Conventions**

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

**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.

**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.



Process for Creating a QuickFlow

Name the QuickFlow — QuickFlow Code Validation

Add pages/forms to the QuickFlow — QuickFlow Definition
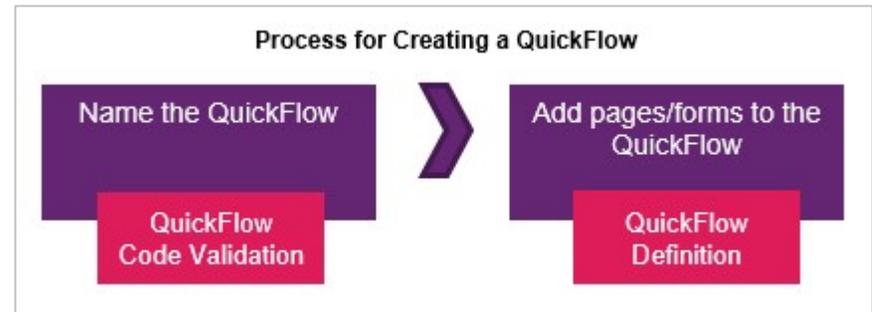
The **Search** field on the Landing Page has been modified so that you can search for and access QuickFlows.

## 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**.