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Banner Transformed

Getting Started With Your Administrative Applications
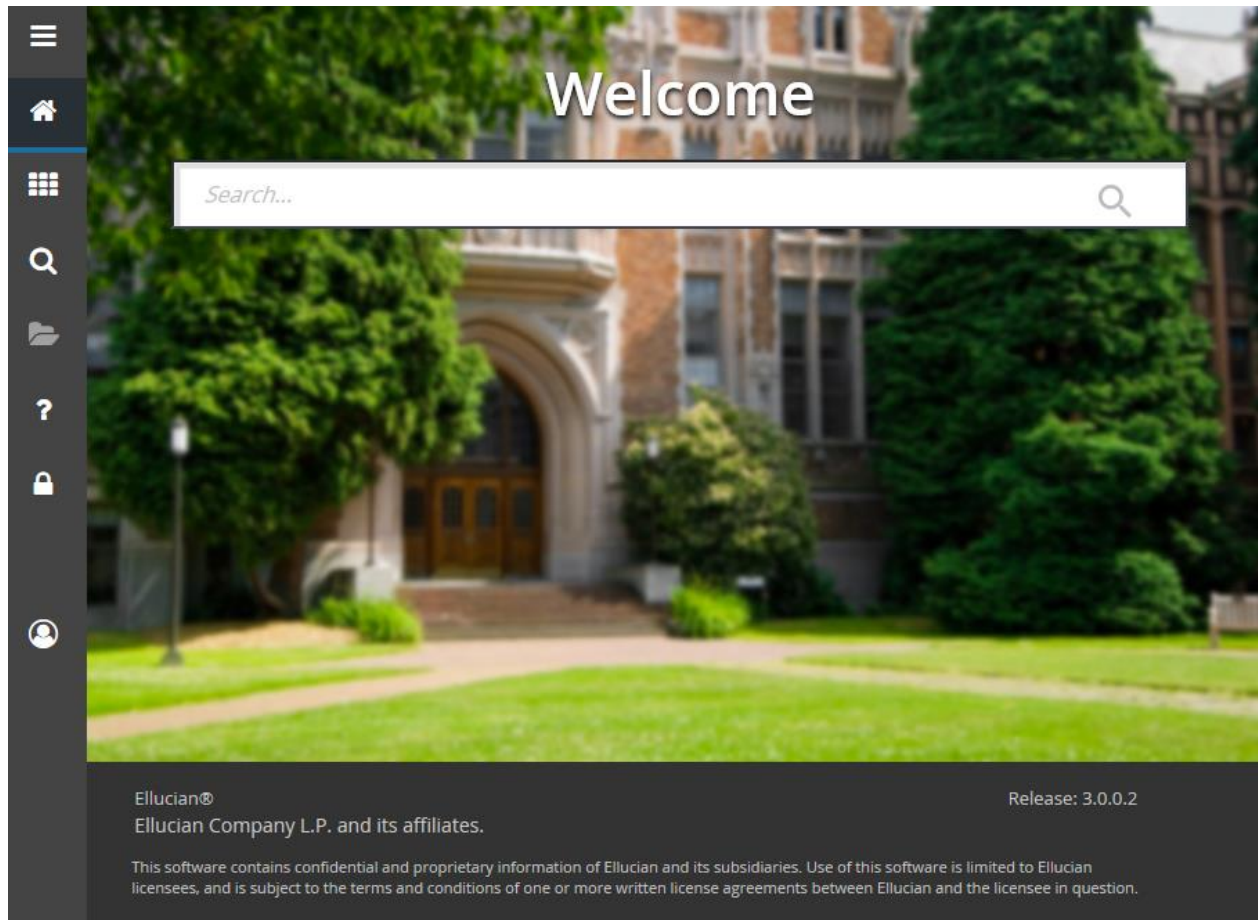
Release 9.x
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Contents

Application Navigator

Application Navigator uses single sign on to provide access to transformed pages

Sign in using the URL to access the page and use the credentials provided by your institution to access Application Navigator. You can then use any of the following to navigate within Application Navigator:

- The **Menu** icon is a group of three horizontal lines at the top left of the page. It indicates the main menu. Clicking this icon will display or hide the names of the Application Navigator icons. Click the **Menu** icon or the **Back to Main Menu** link to display the main menu on any screen.

- The **Dashboard** icon is indicated by a home image. Click this icon to return to the landing page from any screen.

- The **Applications** icon is indicated by 9 small boxes in a grid of 3 by 3. This icon is used to display the **Banner**, **My Banner**, and **Banner Self-Service** menus, in addition to menus for any other integrated applications such as Banner 9 Registration.

- The **Search** icon, indicated by a magnifying glass, can be used to find pages or forms using key words or the seven letter object identifier for the form or page. This search is performed on the

menu data, therefore if the form or page is not included on the menu, it is not included in the search results.

- The **Recently Opened** icon is indicated by an open file folder. When a new page is opened, the number attached to the folder increases by one. When selected, the recently opened icon displays a list of the recently opened forms and pages.

- The **Help** icon, indicated by a question mark, displays the online help for Banner 9 administrative applications.

- The **Sign Out** icon, indicated by a lock, is used to log out of Application Navigator.

- The landing page contains a search field which can be used to search for forms, pages, jobs, menus, and quickflows. If a form or page is selected, that form or page will open. If a menu item is selected from the landing page search results, the menu panel will open and the selected menu will be displayed. When an item is selected from the search results, the search results list is cleared.

Application Navigator has a set of keyboard shortcuts, which you can review by clicking on **Keyboard Shortcuts** in the bottom right corner of the page. See Banner keyboard shortcuts on page 18 for more information about the Application Navigator keyboard shortcuts.

It is important to remember to use the **Sign Out** link when closing the application instead of just closing your browser to make sure you are logged out of the application.

Basic Navigation

The basic navigation of each page includes the page header, notification center, key block, sections, and buttons.

Page header

The page header is part of the basic navigation.

The page header contains the following items:

- Page close icon ✕

- Page title, which is formatted according to the preferences established on the User Preference (GUAUPRF) page.

- **Add** and **Retrieve** icons, which are used with Banner Document Management.

- Related Menu, which displays a list of pages that can be accessed from this page. These are defined on the Options Maintenance Menu (GUAOPTM) page.

- Tools Menu, which includes refresh, export, print, clear record, clear data, item properties, display ID image, page layout, and other options controlled by the page.

- Notification Center.

The Notification Center is located to the right of the **Tools** menu and displays the following types of information as needed:

- Successful save of data

- Warning messages

- Error messages

- Informational messages

- Number of messages to be corrected to continue in the page

You can click in the box with the number in the page header to open or close the Notification Center.

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** button, the data is rearranged into a linear format.

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**.

Sections

Pages are divided into sections that contain additional details for the key information. A section can represent one record or multiple records depending on the type of information that you are working on.

Each section contains related information.

Sections of data are accessed by scrolling up and down the page. They can be opened or collapsed by clicking on the arrow on the far left side of the section header. Some sections are accessed by using tabs that group information in a meaningful way.

If available, the sections can have a header that includes icons for the following actions:

• **Insert.** Use this to insert records in the section.

• **Delete.** Use this to delete records in the section.

• **Copy.** Use this to copy records in the section.

• **Filter.** Use this to filter records in the section.

• **More Information.** Use this if supplemental data can be entered for a section.

The **More Information** icon is displayed as a blank page if supplemental data can be entered for the record. The icon is displayed as a page with lines if supplemental data already exists for the record.

If supplemental data cannot be entered for a section, the icon is not displayed. Refer to *Supplemental Data Engine* for more details.

Buttons

Banner transformation includes several buttons.

Button	Description
Add and Retrieve	Use the Add and Retrieve buttons to interact with Banner Document Management to properly store and review documents. Additional document management functions can be found by opening the **Tools** menu and scrolling down the menu to the Banner Document Management section.
Go	Use the Go button to advance to the body of the page after populating the key block.
Button	Description
Release and Submit	Use the Release and Submit buttons to interact with Banner workflow to submit a page or to release a page from the work flow. These buttons only appear when you have accessed the workflow application, and selected a work flow to begin.
Save	Use the Save button to save changes on the page. The Save button is located on the bottom right side of the page.

Section Navigation	Use the Next Section button to navigate to the next section of data. Use the Previous Section button to navigate to the previous section of data. The Next Section and Previous Section buttons are located at the bottom left of each page.
Select and Cancel	Use the Select button to select and retrieve data from a called page to the current page. Use the Cancel button to return to the called page without retrieving any data. When you need to go to a secondary or called page to retrieve data, the Select and Cancel are presented at the bottom of the page.
Start Over	Use the Start Over button to return to the key block of the page.

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 to 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

The transformed Banner application has settings to determine how dates are entered and displayed.

You can enter either enter the date directly or use the calendar icon for date selection.

Lookup

The Lookup feature allows you to quickly look up 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.

Filtering data

You can filter data in a section if there is an active **Filter** icon in the section header.

You can filter data using the Basic and Advanced filter options. You can switch between the two filter options at anytime and the search fields will maintain the field values and filter criteria that you specify.

Advanced filter

Use **Advanced Filter** to specify filter data using SQL type operators.

Procedure

1. Click the active **Filter** icon for the section. The Basic Filter panel displays. This is the default filter panel that opens.

2. Select **Advanced Filter** to switch to advanced filter mode. By default, the filter panel displays the first five fields in the key block.

3. **Optional:** Add and remove fields from the filter criteria.

   a) To add a field, select the field from the **Add Another Field** drop-down list.

   b) To remove a field, select ⊖ on the right side of the filter panel or select **Clear All** to remove all fields.

4. Choose an operator from the **Equals** drop-down list.

   The available operators depend on the type of field (numeric, alphanumeric, date, check box, or other).

   The Equals and Contains operators are 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.

5. Enter a value for each field of the filter criteria that you select. Where applicable, you can click the LOV button to select a value from the list that appears.

6. **Optional:** Switch to Basic Filter by clicking **Basic Filter**.

   This switches the filter panel to Basic mode and retains the filter criteria that you previously specified.

   The operator that you select in Advanced Filter mode converts to the appropriate Basic operator as shown in the table below.

Advanced Operator	Basic Operator
Contains	%A%
Starts With	A%
Ends With	%A
Not Equal	<> A
Not Equal or IS NULL	#IS NULL #OR <>
IS NULL	#IS NULL
IS NOT NULL	#IS NOT NULL
Identical to Contains, Start With and Ends With	#Like

7. After you enter all filter criteria, click **Go** to display the filter results.

The number of records retrieved displays at the bottom of the section. You can sort the results for a field in ascending or descending order by clicking on the field label in the column header. You can reverse the sort order by clicking the field label.

8. **Optional:** If you want to perform another filter, click **Filter Again**.

9. **Optional:** If you want to close the filter and display all unfiltered records, click the lowercase in the upper right corner of the filter window to close the filter.

Basic Filter

Use **Basic Filter** to specify filter data using a customized list of search fields that provides a quick and simple way to enter a value into a field.

Procedure

1. Click the active **Filter** icon for the section. The Basic Filter panel is the default filter and it displays the first five fields in the key block.
2. **Optional:** Add and remove fields from the filter criteria.

    a) To add a field, select the field from the **Add Another Field** drop-down list.

    b) To remove a field, select on the top right side of the filter panel or select **Clear All** to remove all fields.

3. Enter a value for each field of the filter criteria that you select. Where applicable, you can click the LOV button to select a value from the list that appears.

    You can use the following Basic operators when entering values into text fields.

Basic Operator	Advanced Operator
%A%	Contains
A%	Starts With
%A	Ends With
<> A	Not Equal
#IS NULL #OR <>	Not Equal or IS NULL
#IS NULL	IS NULL
Basic Operator	**Advanced Operator**
#IS NOT NULL	IS NOT NULL
#Like	Identical to Contains, Start With and Ends With

4. **Optional:** Switch to Advanced Filter by clicking **Advanced Filter**.

This switches the filter panel to Advanced mode and retains the filter criteria that you previously specified.

The operator that you select in Basic Filter mode converts to the appropriate Advanced operator as shown in the table above.

5. After you enter all filter criteria, click **Go** to display the filter results.

   The number of records retrieved displays at the bottom of the section. You can sort the results for a field in ascending or descending order by clicking on the field label in the column header. You can reverse the sort order by clicking the field label.

6. **Optional:** If you want to perform another filter, click **Filter Again**.

7. **Optional:** If you want to close the filter and display all unfiltered records, click the lowercase ✕ in the upper right corner of the filter window to close the filter.

Help

Application Navigator provides online help for pages.

Click on the question mark in the Application Navigator header to open the help for the page in context. You can perform various actions in the help suite For example, you can search for topics or print the information.

Help is translated into Spanish. If you set your browser locale language to be Spanish and open the help file, it will be presented to you in Spanish.

Multiple records

Data can exist in multiple records of the same type in the database, for example addresses, are displayed in multiple ways.

Records can be viewed two different ways:

• **One record at a time.** In this instance, the details of the data are not displayed in a table grid, but rather in a more easily readable manner. You can move from record to record using pagination controls.

- **In a grid.** In this instance the data is presented in column and row format. You may need to scroll to view all the data. You can page through the records using the pagination controls (first, last, next, previous, or specific page number), decide how many records you want to review in the grid, and sort the data in ascending or descending order.

Page Layout

You can toggle between Compact page layout (default) or Expanded page layout by selecting the page layout option on the Tools menu

There are two different page layout options to choose from.

- Compact (default)

  This layout reduces the amount of excessive white space on pages and increases the amount of information visible on a page, limiting the need to scroll vertically.

- Expanded

  This layout displays pages with increased white space and reduces the amount of information visible on a page. This may result in the need to scroll to see all of the information.

You can switch between Compact page layout and Expanded page layout by clicking **Tools** > **Page Layout** and selecting either **Expanded** or **Compact**. The page layout that you select remains active for your browser session. When you close your browser, the page layout reverts to the default **Compact** the next time you open a new browser session and log in to Application Navigator.

Print

Printing is most effective when using the Compact Page layout.

Compact Page layout provides for the best fixed width printing ratio. You can reorder columns to move the most important data to appear first and ensure that these columns are visible on the printed page.

Banner keyboard shortcuts

The following table lists the keyboard shortcuts that you can use to navigate through Banner versions 8 and 9. **Bold entries** indicate actions with keyboard combinations that are new or updated in Banner 9.

Action	Banner 8	Banner 9
Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)	CTRL+Q	CTRL+Q
Change MEP Context	**Not applicable**	**ALT+SHIFT+C**
Choose/Submit	ENTER	ENTER
Clear All in Section	SHIFT+F5	SHIFT+F5
Clear One Record	SHIFT+F4	SHIFT+F4
Clear Page or Start Over	**SHIFT+F7**	**F5**
Count Query	SHIFT+F2	SHIFT+F2
Delete Record	SHIFT+F6	SHIFT+F6
Down/Next Record	Down Arrow	Down Arrow
Duplicate Item	F3	F3
Duplicate Selected Record	F4	F4
Edit	CTRL+E	CTRL+E
Execute Filter Query	F8	F8
Exit	CTRL+Q	CTRL+Q
Expand/Collapse Drop-down Field	**Click field**	**ALT+Down Arrow**
Export	**Extract Data with Key or Extract Data no Key**	**SHIFT+F1**
First Page	**Not applicable**	**CTRL+Home**

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Insert/Create Record	F6	F6
Last Page	**Not applicable**	**CTRL+End**
List of Values	F9	F9
More Information	**ALT+H**	**CTRL+SHIFT+U**
Next Field or Item	TAB	TAB
Next Page Down	Page Down	Page Down
Next Section	**CTRL+Page Down**	**ALT+Page Down**
Open Menu Directly	**F5**	**CTRL+M**
Open Related Men	**Not applicable**	**ALT+SHIFT+R**
Open Tools Menu	**Not applicable**	**ALT+SHIFT+T**
Page Tab 1 **Page Tab 2** **and so on**	**Not applicable**	**CTRL+SHIFT+1** **CTRL+SHIFT+2** **and so on**
Previous Field or Item	SHIFT + TAB	SHIFT + TAB
Previous Page Up	Page Up	Page Up
Previous Section	**CTRL+Page Up**	**ALT+Page Up**
Print	**SHIFT+F8**	**CTRL+P**
Refresh or Rollback	**SHIFT+F7**	**F5**
Save	F10	F10
Search or Open Filter Query	F7	F7
Select on a Called Page	**SHIFT+F3**	**ALT+S**
Toggle Multi/Single Records View	**Not applicable**	**CTRL+G**
Up/Previous record	Up Arrow	Up Arrow

Toggle Accessibility mode ON/OFF for current session	**Not applicable**	**CTRL+B**
Workflow		
Release Workflow	**Icon or Menu**	**ALT+Q**
Submit Workflow	**Icon or Menu**	**ALT+W**
Banner Document Management (BDM)		
Add BDM Documents	**Icon or Menu**	**ALT+A**
Retrieve BDM Documents	**Icon or Menu**	**ALT+R**
Application Navigator		
App Nav - Access Help	Banner 9 keyboard shortcuts for Application Navigator will work in Banner 8 if you are running Banner 8 with Application Navigator and have applied the keyboard configuration settings.	**CTRL+M**
App Nav - Access Menu		**CTRL+Y**
App Nav – Display Recently Opened Items		**CTRL+SHIFT+L**
App Nav - Search		**CTRL+SHIFT+Y**
App Nav – Sign Out		**CTRL+SHIFT+F**