KENT STATE
UNIVERSITY
Information Services

Banner Administrative Pages
Navigation and Basic User Guide
October 2018

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Introduction to Ellucian Banner Administrative Pages

The purpose of this guide is to introduce the learner to the basic functions of Ellucian Banner Administrative Pages, updated at Kent State University in 2018, including navigation, name searching, record query, and record updates.

Banner is web a based database application that is comprised of six major product modules, or information packages. Each product module has application sub-modules.

1. **Student**
2. **Advancement**
3. **Finance**
4. **Human Resources – Payroll/Position Control**
5. **Financial Aid**
6. **General**

All information is stored in a single database and is accessed according to need through the different modules.

For example, a Kent State University employee who is also a student and an alumnus will have a record in the Human Resources system, the Student system, the Advancement system and possibly the Finance system. Storing this information in four separate systems would lead to outdated, inaccurate information and poor data integrity. In Banner, when the employee's address is updated, the correction is shared by the other modules.

Ellucian is the name of the company that owns the Banner product suite.

Banner is the name of the ERP or enterprise resource planning database system.

Banner INB is the previous 'core' database system, used to view and update records.

Banner 9 is the updated, web based Banner Administrative Pages application.

INB stands for Internet Native Banner, which means it is a web application.

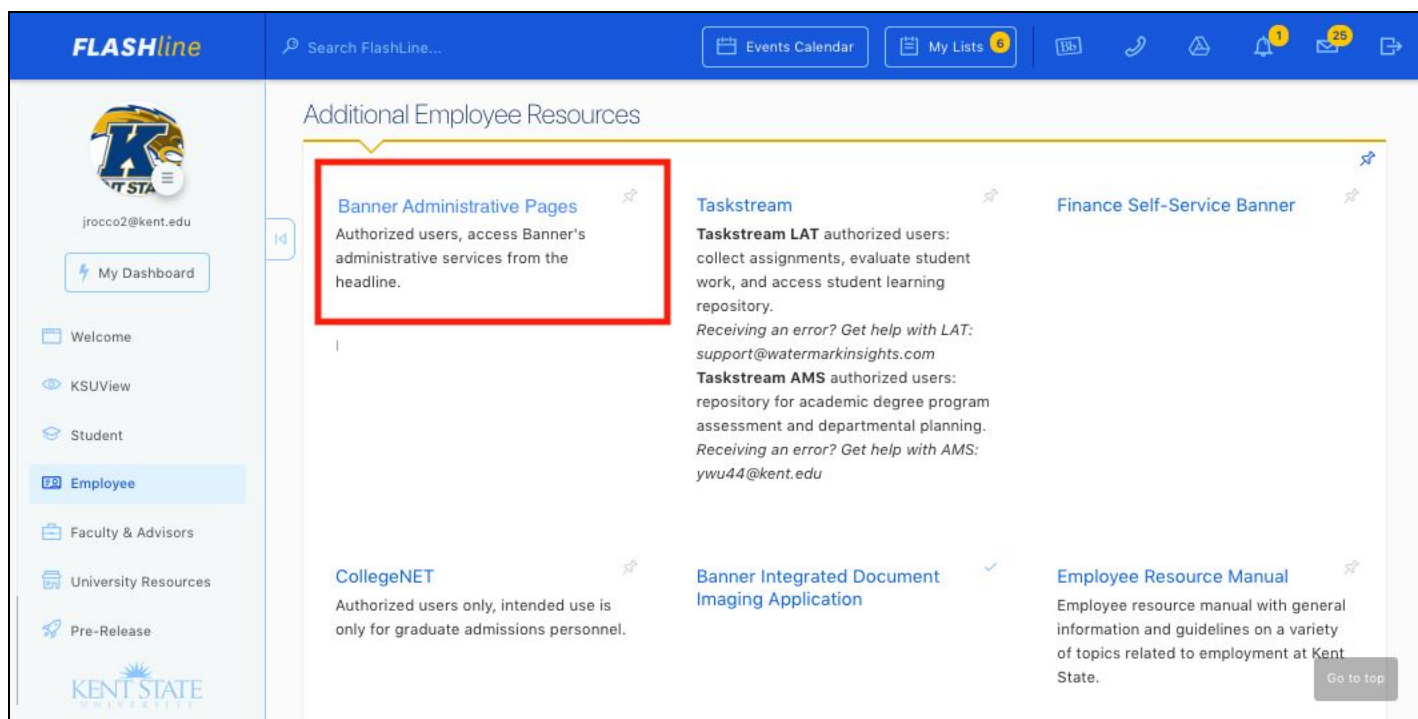There are other modules in the Banner product suite, including:

Luminis web portal, branded as 'FlashLine' at KSU

Banner Self Service, branded as 'FlashFast' at KSU

Banner Workflow

Accessing Banner

Banner is accessible through a link in FlashLine on the Employee Page, in the Additional Employee Resources Section.


STEP	ACTION
1.	Log in to FlashLine from the Kent State web page at **www.kent.edu** or your campus homepage.
2.	Open the **Employee Page** from the Left Navigation Menu.
3.	Select the **Additional Employee Resources** section .
4.	Click the link for **Banner Administrative Pages**.

If Banner does not accept your ID and password, contact your supervisor.

Banner Application Home Page

The tools on the Banner 9 home page offer simple navigation to locate the Pages, Records, Settings and Quickflows that may be required to aid students, faculty, and staff at Kent State University. Below is an example of a Home Page noting the many features located there.
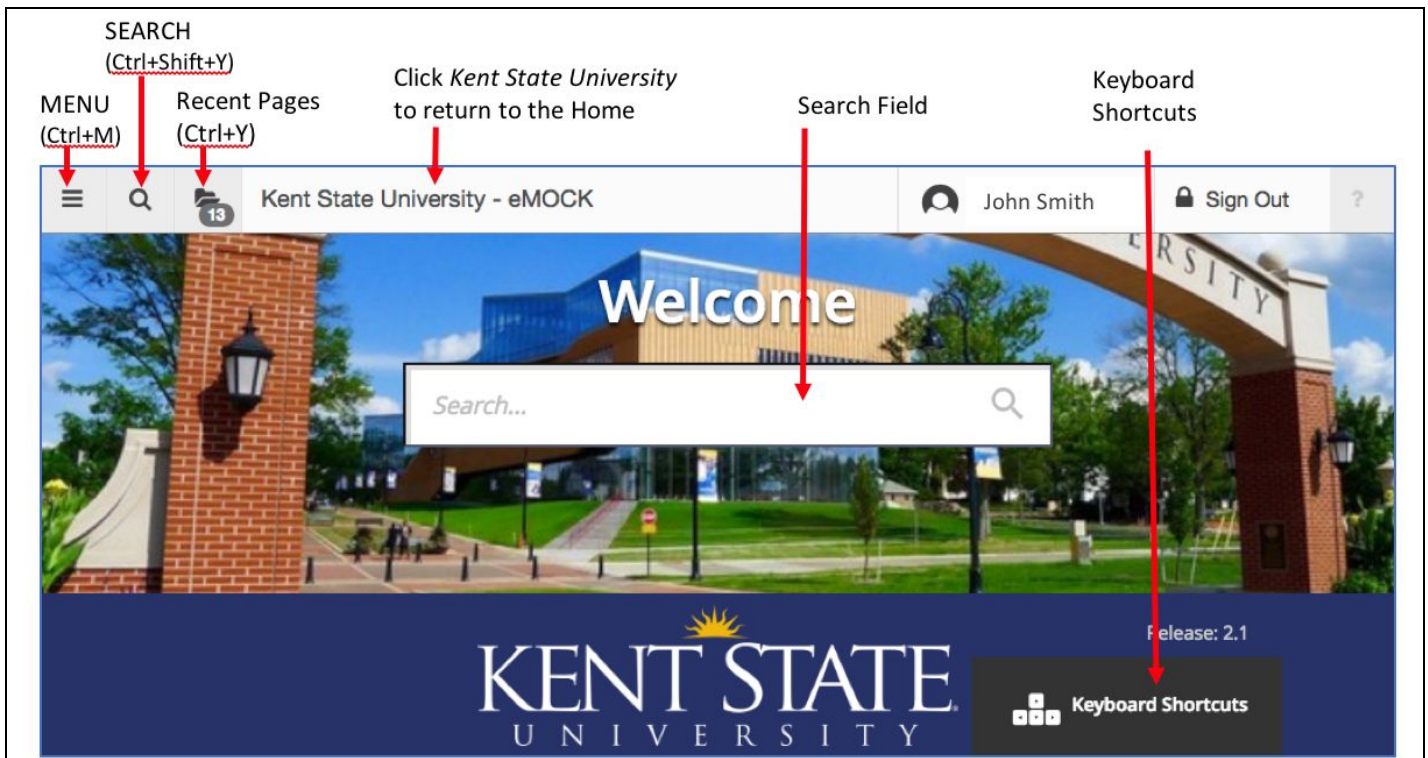
The **Menu Icon** reveals menus for drill down searching of pages throughout the Banner system or previously saved in the individual My Banner folder.

A **Search Icon** displays a search panel to search by page name or Banner 8 form code, while not interrupting the current view.

A **Recent Pages Icon** allows for navigation to the previous ten pages viewed in the current session.

The **Home Page Link**, will return users to the Application Home Page.

The **Search Field** enables searches for Banner items, such as pages and workflows, to be made from the Application Home Page.

An icon at the bottom of the screen offers **Keyboard Shortcuts** for additional navigation options.

Menu Icon

Banner pages can be found by clicking the **Menu Icon** and drilling down through appropriate folders find the desired page.
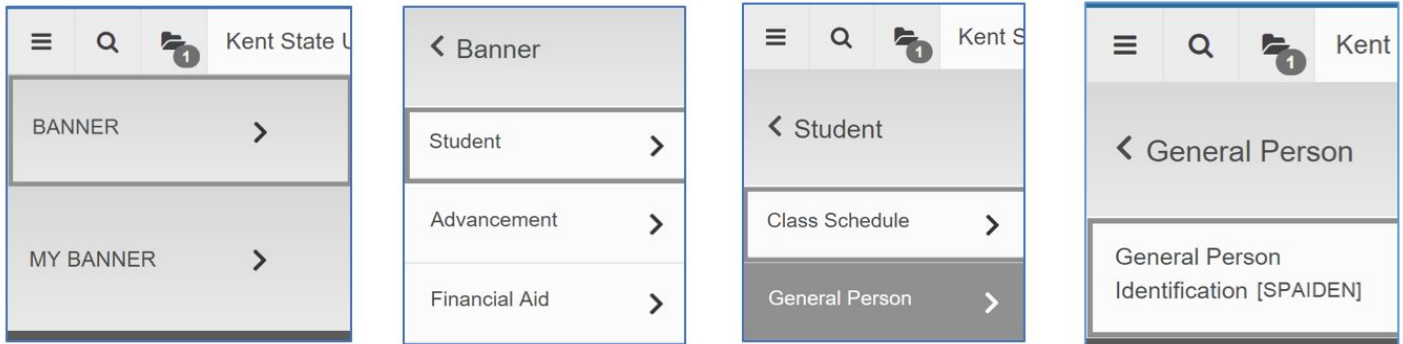

Searching

Banner Administrative Pages can also be accessed by initiating a search with either the **Search Icon** or the **Search Field**, by entering the Page Name, or the Banner 8 seven-letter form name. As the search data is entered, Banner will retrieve potential matches. Clicking on the appropriate page name will display the form for record retrieval.
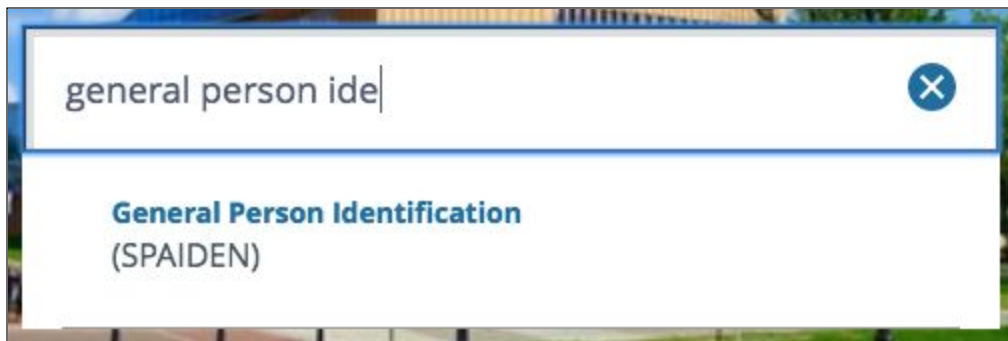
Note: Information regarding the Banner 8 seven-letter codes may be referenced in the Kent State University document "Banner Naming Convention-PDF" located in the Banner General Resources page of the Information Services Department.

Recent Pages

Clicking the **Recent Pages** icon, displays the pages previously visited during the current Banner session. Logging out of Banner will clear the Recent Pages list. Previously visited pages may be selected from the list to be reopened.
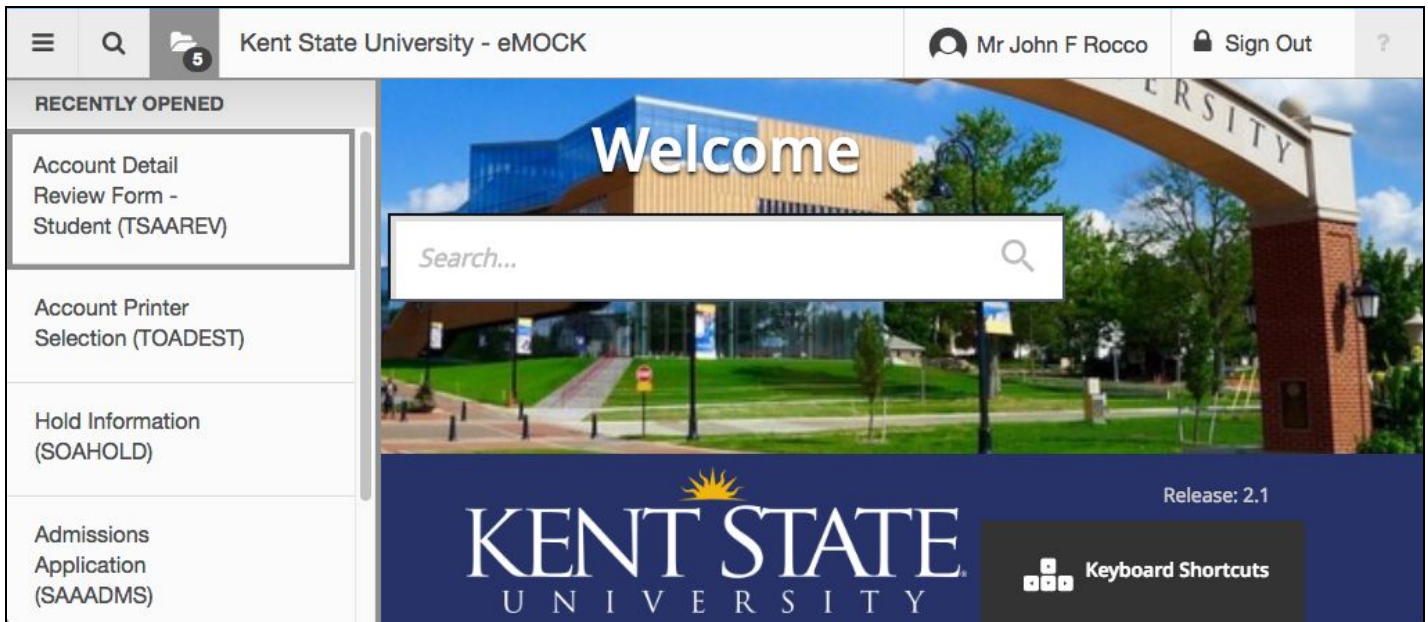
Keyboard Shortcuts

Clicking the **Keyboard Shortcuts** icon displays the available typing shortcuts for the current page.
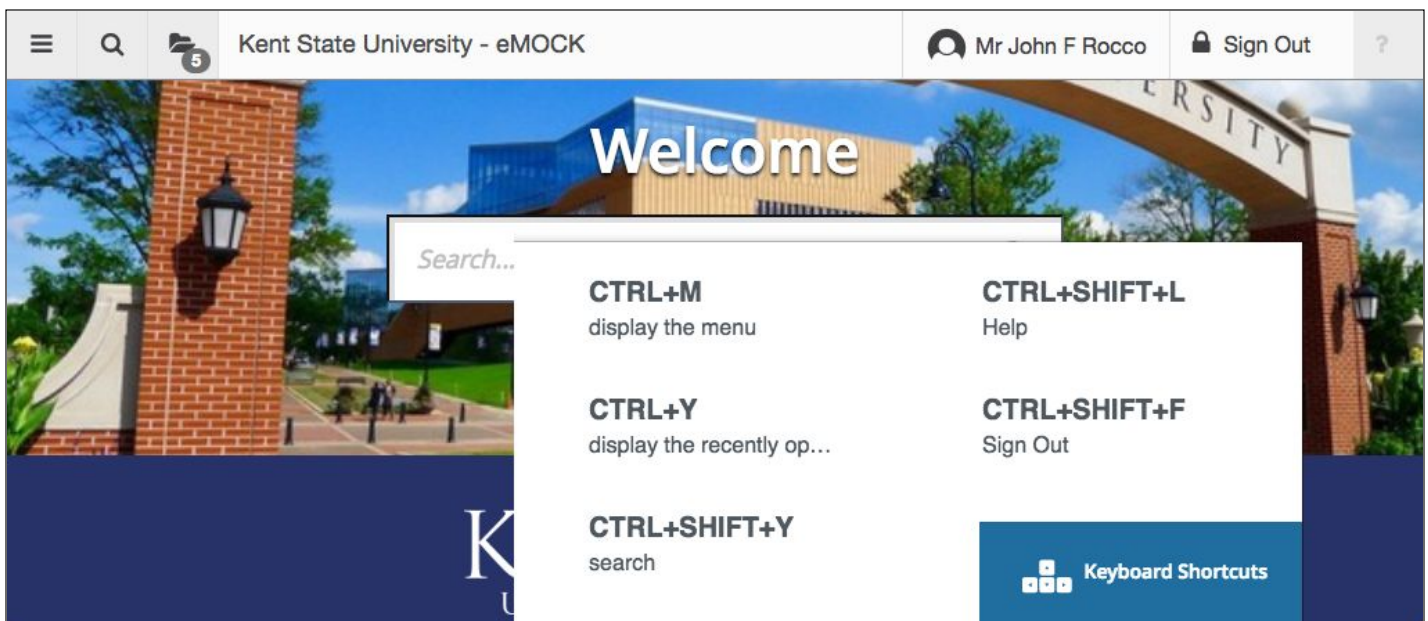
Application Navigator

With a page open, the Application Navigator allows users to locate Banner data, and related documentation and information. Pages are arranged in sections to display a record or records, and can be viewed using a scrollbar, or expanded and collapsed using display arrow on the far left of the section. On most pages is located the **Key Section**, a ribbon across the top of the page which includes several action buttons, such as a **Close Page Button**, and **Add** and **Retrieve Buttons** to attach, or view related documents. Also in the Key Section are **Related** and **Tools Buttons** to access additional tools and options, as well as a **Go Button** to perform a request.

Key Section

Below the ribbon, records can be retrieved using an **ID input field**, for entry of a Kent State University ID number. If the ID number is not available, pressing the [Tab] key on the keyboard navigates to a name entry field, similar to the previous version of banner.
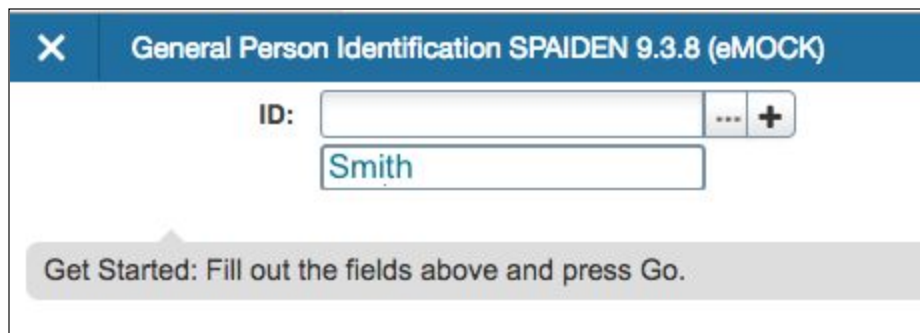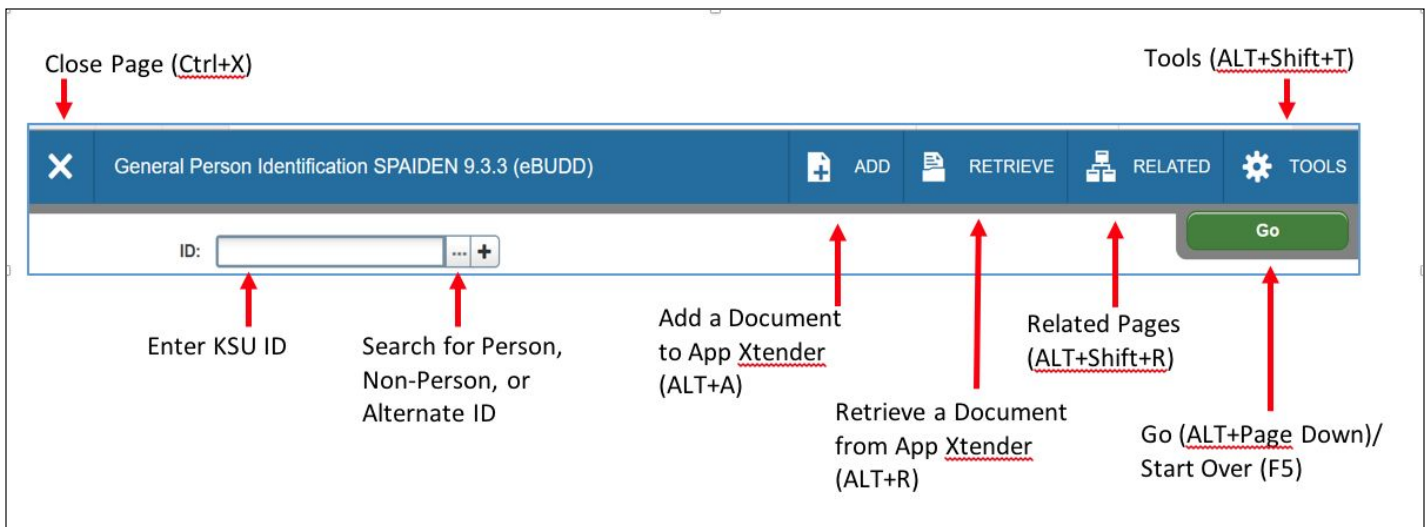
Extended Search

And, like the previous version of Banner, should more than one record meet the name search criteria, an **Extended Search** window will open. This allows the user to **See All Results**, navigate to a page for **Person Search Detail** or **Non-Person Search Detail**, or reduce the number of results by adding more criteria to the current search.

Person Search

Additionally, a search for a record may be initiated using the **Search Button**, immediately to the right of the ID Number entry field, inside the Key Section. This allows users to add filter fields to restrict the queried data and return more specific records in searching by Person, Non-Person, or Alternate ID.

Note: Navigation Tips and messages may appear in the top, right corner of the page, below the navigation ribbon, with the number of notifications in a seperate box above. Clicking on the notification number will hide the message.

Record Selection

If multiple records meet the search criteria, the results of the query will appear in a sheet listing the data for all records meeting that criteria. A **Filter Button** allows for additional filters to be added to the queried results to further reduce the number of records in the list.

The individual record from a list can be retrieved by clicking once on the appropriate record to select it, then clicking on the **Select Button**. This will bring the record to the search field by ID number.

Viewing a Record

Clicking the **Go Button** will retrieve the record.

The Application Navigator displays the record or records in an information page which is divided into sections. These sections can be accessed by scrolling up or down the page, or by using the **Previous Section** and **Next Section** buttons at the bottom of the page. The sections can also be expanded or collapsed by using the arrow next to the Section Header.

Buttons in the page header, section headers, and at the bottom of the page offer quick access to some of the Banner tools necessary to work on records.

Record Navigation Buttons

| Button	Description
Add and Retrieve	The Add and Retrieve buttons are used to interact with Banner Document Management. Additional document management functions can be found by opening **Tools.**
Go	The Go button is used to advance the body of the page after populating the Key Section
Release and Submit	The Release Button and the Submit button are used to interact with the Banner workflow. These buttons only appear when the workflow application has been accessed and a workflow has been selected.
Save	The Save button, located at the bottom, right of the page, is used to save changes made in the form.
Section Navigation	The Next Section button and the Previous Section button, located at the bottom, left of each page, allow for navigation to the next or previous section of data.
Select	The Select button is used to retrieve data from a called page to the current page.
Cancel	The Cancel button is used to return to the called page without retrieving any data.
Start Over	The Start Over button will clear the data and return to the Key Section of the page.

Required Fields
An asterisk (✱) displayed next to a field name indicates that the field requires a value before the next page may be accessed.

Lookup
The Lookup button **...** next to a field indicates the field has a lookup feature. Clicking the Lookup button allows for entry of a filter value to limit results. Selecting a value and clicking the OK button returns the value to the calling page.

Filtering Data
Data in a Section can be filtered if there is an active filter icon ▼ Filter in the Section Header.

My Banner

From the Application Home page, the Menu Button offers navigation to the **Banner** menu for page selection, as well as the **My Banner** menu to open pages from a user customized favorites list.
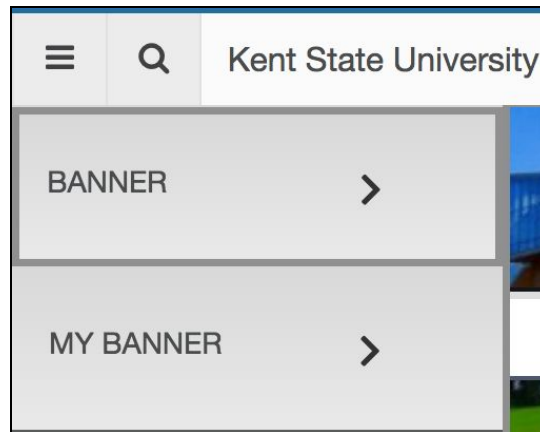
A customized **My Banner** list can be created by accessing the **My Banner Maintenance** page.
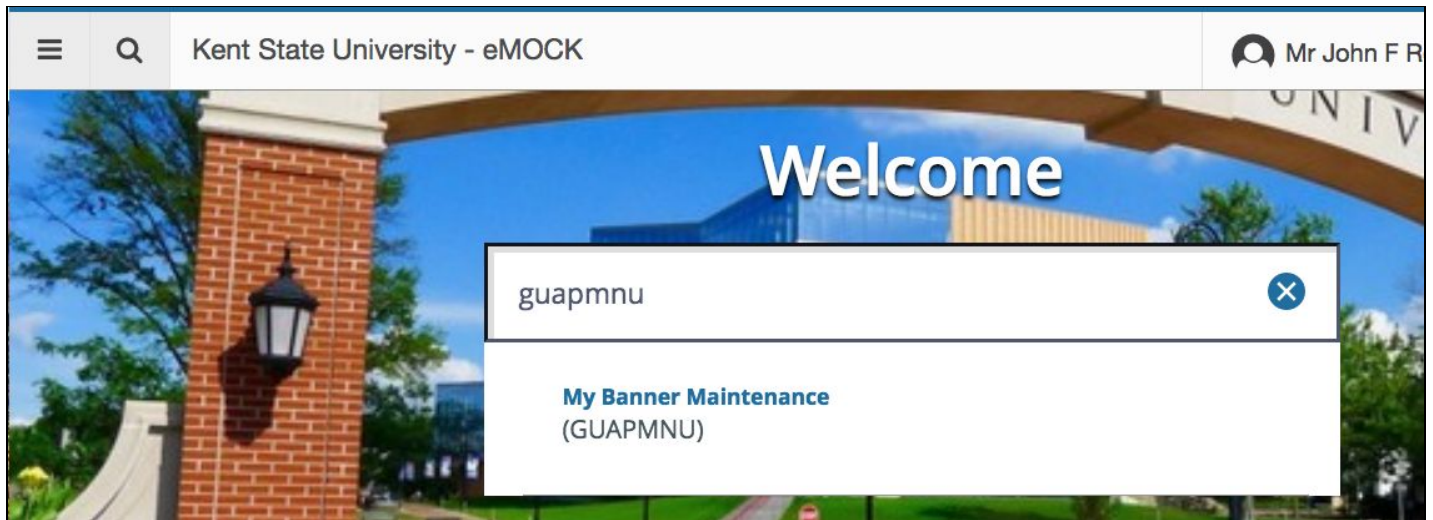
The **My Banner Maintenance** page allows users to select the pages that are most frequently used and add them to a personal list for ease of access.

Pages can be selected from the object list on the left and added to the personal list on the right by selecting the page by name and clicking the **Insert Selection Button** in the center of the page.

Alternatively, pages can be added with a lookup feature using the **Insert Button** in the Section Header.

Typing either the Seven-Letter Code in the **Object** column, or entering the Page Name in the **Description** column, and pressing the retrieve the page information. Multiple pages may be added at one time, but the **Save Button** at the bottom of the page must be clicked in order to complete the process of creating the personal **My Banner** list.

Note: A best practice for building a **My Banner** menu is to have a list of the desired pages prior to accessing the My Banner Maintenance page, and entering the pages using the Seven-Letter codes, in the order they should appear in the menu.

QuickFlows

A QuickFlow is a macro-instruction, or macro, that can follow a sequence of Banner pages. If a repetitive procedure must be completed, like updating codes for a series of student records, on multiple pages, a QuickFlow can be a more efficient method of viewing and entering data. Many QuickFlows have been created already in Banner and are available for use throughout the university. If one cannot be found to exactly meet the user needs, a new Quickflow can be easily prepared.

Creating a QuickFlow

A QuickFlow can be created on the **QuickFlow Code Validation** page, (GTVQUIK), accessed from the Home page. Once it has been created and named, appropriate pages can be added to the new QuickFLow on the **QuickFlow Definitions** page, (GUAQUIK).

Name the QuickFlow

STEP	ACTION
1.	Access the QuickFlow Code Validation page - GTVQUIK
2.	Select **Insert** from the Section Header
3.	Name the QuickFlow in the **Code** field
4.	Add a **Description** of the QuickFLow for reference and searching purposes
5.	Click the **Save button**

Note: For organization and ease of searching, the Code Names of the QuickFlows should be created using the first letter according to department or unit as noted below.

B for Bursar	**F** for Finance	**S** for Financial Aid
A for Advancement	**C** for Acad. Personnel	**H** for Human Resources
I for Int'l Affairs	**M** for Admissions	**P** for Provost
R for Registrars	**OS** for OneStop	
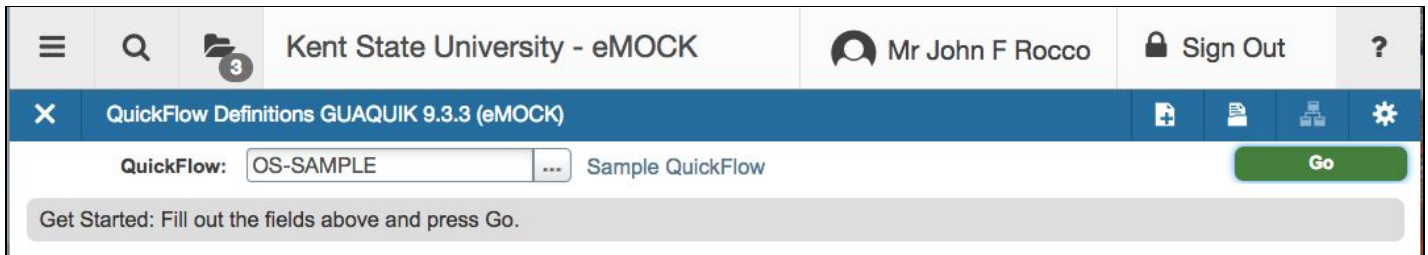
Build the QuickFlow
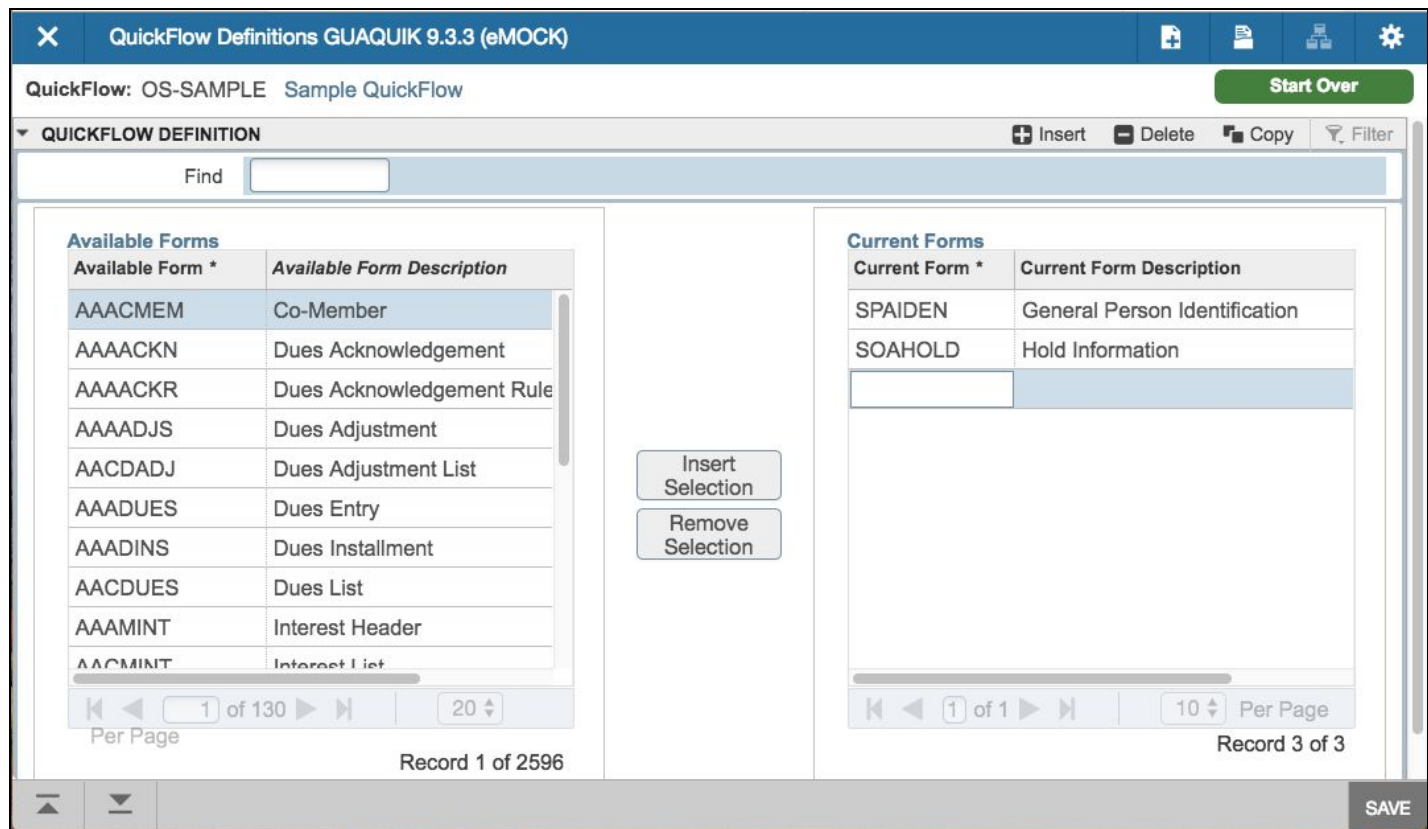
With the QuickFlow created and named, the appropriate Banner pages can be added by accessing the **QuickFlow Definitions** page (GUAQUIK).

Entering the new QuickFlow Code name and pressing [Enter] will retrieve the object. Clicking the **Go** button will open a new section for entry of the Banner Pages to be included in the QuickFlow. Pages can be selected from the **Available Forms** list and added to the QuickFlow **Current Forms** list with the **Insert Selection** button, or typed directly into the **Current Form** column, and using the keyboard down arrow to open another form entry field.

When all forms have been entered, clicking the **Save** button will complete the creation and the QuickFlow will be available for use.

Run a QuickFlow

QuickFlows can be opened and run from the **QuickFlow** page (GUAQFLW), which can be accessed from the Home Page or search feature.
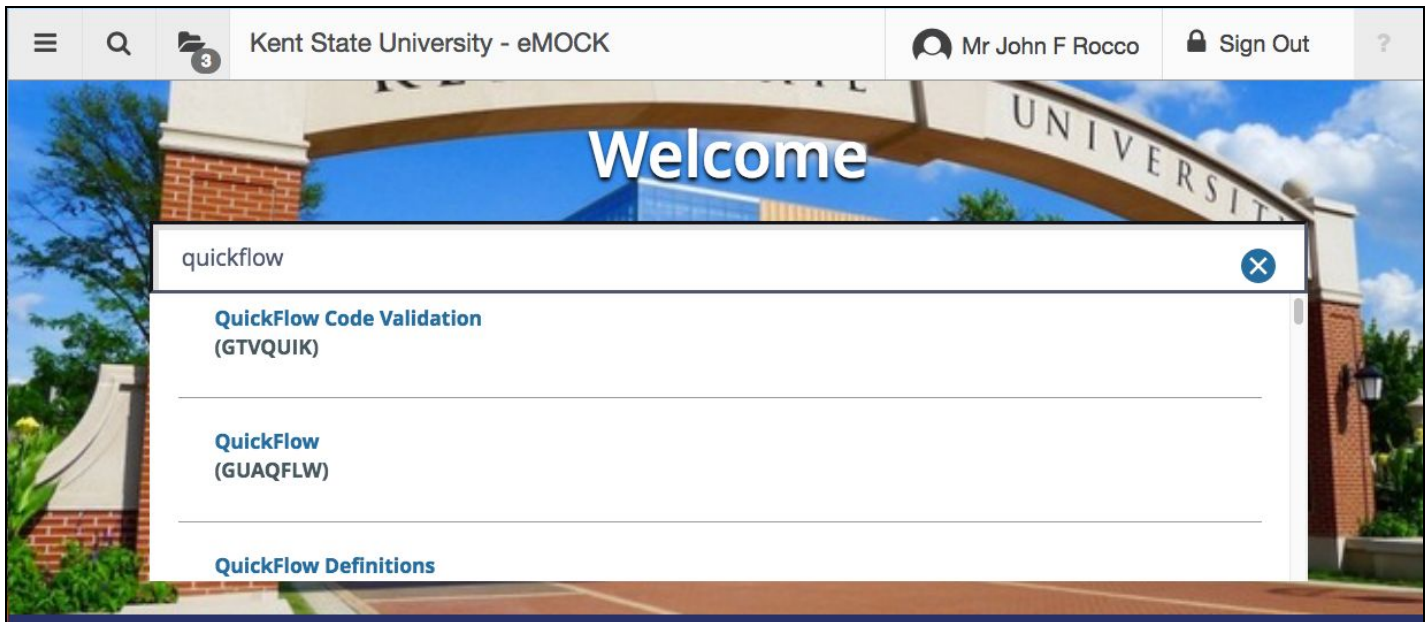
Opening the QuickFlow page will display a search window to select the desired QuickFlow. The Code Name of the QuickFlow can be typed in the entry field, and the **Enter** key pressed for retrieval, or the **Search** button with the three ellipses can be used to open a detailed **QuickFlow Query** page (GUQQUIK). This page displays a list of available QuickFLows in the top section, and corresponding forms included in the specific highlighted QuickFlow above.
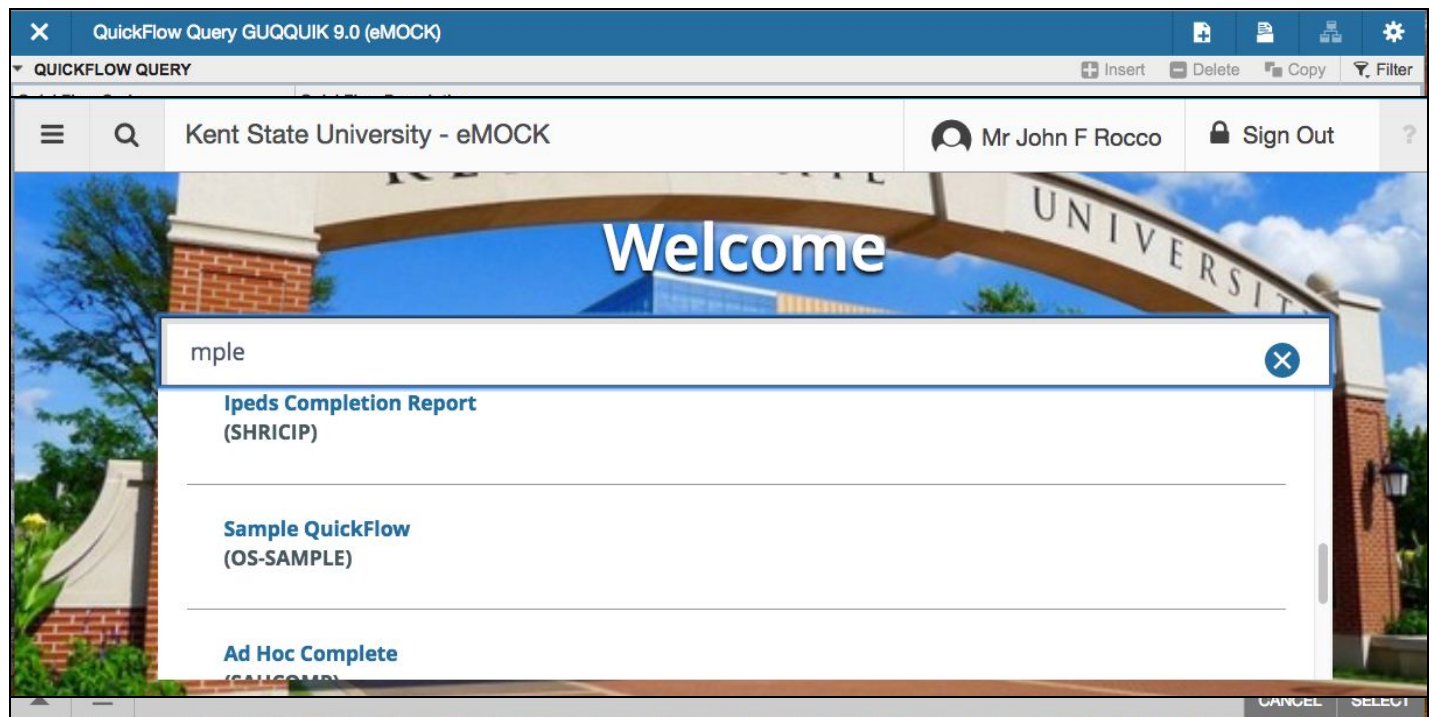
Alternatively, the Quickflow can be searched for from the Home page by either the Code name or the QuickFlow Description using all or part of the name.

Run the QuickFlow

STEP	ACTION

1. Access the QuickFlow
2. Access the first record bu KSU ID or searching
3. Click the **Go** button to access the first page of the QuickFlow
4. Verify/edit data and click **Save** if an update is needed
5. Click the "X" in the top left to **Close** the page and access the next
6. Repeat steps 3-5 until the last page of the QuickFlow is accessed
7. Once the final page has been used, the Record entry/search page will start over

Banner Keyboard Shortcuts

The Following table displays the Keyboard Shortcuts used to navigate Banner 8 and the updated Keystroke Shortcuts for Banner Administrative Pages.

Action	Banner 8	Banner Administrative Pages
Application Manager		
Access Help		CTRL+M
Access Menu		CTRL+Y
Display recently opened items		CTRL+SHIFT+L
Search		CTRL+SHIFT+Y
Sign Out		CTRL+SHIFT+F
Banner Document Management (BDM)		
Add BDM Documents	Icon or Menu	ALT+A
Retrieve BDM Documents	Icon or Menu	ALT+R
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
Copy	CTRL+C	CTRL+C
Count Query	SHIFT+F2	SHIFT+F2
Cut	CTRL+X	CTRL+X
Delete Record	SHIFT+F6	SHIFT+F6
Down/Next Record	Down Arrow	Down Arrow

Action	Banner 8	Banner Administrative Pages
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
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 Menu	Not Applicable	ALT+SHIFT+R
Open Tools Menu	Not Applicable	ALT+SHIFT+T
Page Tab1 Page Tab 2 And so on	Not Applicable	CTRL+SHIFT+1 CTRL+SHIFT+2 And so on
Paste	CTRL+V	CTRL+V
Previous Field or Item	SHIFT+Tab	SHIFT+Tab
Previous Page Up	Page Up	Page Up
Previous Section	CTRL+Page Up	ALT+Page Up

Action	Banner 8	Banner Administrative Pages
Print	SHIFT+F8	CTRL+P
Redo	Not Applicable	CTRL+SHIFT+Z
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
Undo	Not Applicable	CTRL+Z
Up/Previous Record	Up Arrow	Up Arrow
Workflow		
Release Workflow	Icon or Menu	ALT+Q
Submit Workflow	Icon or Menu	ALT+W