Banner Administrative Pages Quick Guide

Banner is now easier to use with an update to Banner Administrative Pages, which incorporates use of both Banner INB and Banner SSB.

Application Home Page

Find a page using the Menu to drill down through folders or the Search field to specify an item to find.

Application Navigator – Key Section

- Enter KSU ID
- Search for Person, Non-Person, or Alternate ID
- Add a Document to App Xtender (ALT+A)
- Related Pages (ALT+Shift+R)
- Retrieve a Document from App Xtender (ALT+R)
- Go (ALT+Page Down)/Start Over (F5)
Application Navigator – Person Search

Add fields to filter results
Select a filter operator (this may change by page)
Enter the search criteria
Press the F8 key or click the “Go” button to execute the query
Filter Again to search again or reduce the number of results
Highlight the appropriate search result
Use the “Select” button to retrieve the record (Alt+S)
Sections

- Pages are divided into Sections that contain details for the key information. A Section can represent one record or multiple records.
- Sections are accessed by scrolling up and down the page, and can be expanded or collapsed by clicking the arrow on the far left side of the Section header. Some Sections are accessed using Tabs.

Buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add and Retrieve</td>
<td>The Add and Retrieve buttons are used to interact with Banner Document Management. Additional document management functions can be found by opening Tools.</td>
</tr>
<tr>
<td>Go</td>
<td>The Go button is used to advance the body of the page after populating the Key Section</td>
</tr>
<tr>
<td>Release and Submit</td>
<td>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.</td>
</tr>
<tr>
<td>Save</td>
<td>The Save button, located at the bottom, right of the page, is used to save changes made in the form.</td>
</tr>
<tr>
<td>Section Navigation</td>
<td>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.</td>
</tr>
<tr>
<td>Select</td>
<td>The Select button is used to retrieve data from a called page to the current page.</td>
</tr>
<tr>
<td>Cancel</td>
<td>The Cancel button is used to return to the called page without retrieving any data.</td>
</tr>
<tr>
<td>Start Over</td>
<td>The Start Over button will clear the data and return to the Key Section of the page.</td>
</tr>
</tbody>
</table>

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.
Menu Differences

The menu bar items in Banner 8 have are now utilized from the Banner Administrative Pages buttons for “RELATED” items (Alt+Shift+R) and “TOOLS” (gear icon) (Alt+Shift+T) found at the top, right of the page.

Example: Banner 8 Options > Next Action
Banner Administrative Pages Tools > Options > Next Action

Searching / Filtering

In the Banner Administrative Pages, the terminology for ‘searching’ is now referred to as ‘filtering’.

There is a new screen for filtering (keyboard shortcut F7).

If you have already entered search criteria, pressing ‘F7’ does not always clear those filters, but sometimes leaves the filters you have previously entered. The ‘F8’ key still works to apply your search/filter criteria.

Previous / Next Section

In the Banner Administrative Pages, ‘Blocks’ are now referred to as ‘Sections’.

For keystroke shortcut users, the new keyboard shortcut ‘Alt+Page Down’ should work anytime you used the ‘Next Block’ navigation of ‘CTRL+Page Down’.

For point-and-click/mouse users, there are new buttons on the bottom left of the window that allow you to go to the previous (Alt+Page Up) or next (Alt+Page Down) section.

Go / Start Over

The ‘Go’ button on the top right of the page navigates to the main/first section of a page, after the initial parameters are entered on a page, similar to how it is done in Banner 8. Once in the next section, the ‘Go’ button will change into a ‘Start Over’ button.

The ‘Start Over’ button is the Banner Administrative Pages replacement for the ‘Rollback’ button used in Banner 8. Alternatively, the ‘F5’ key can be used to perform the ‘Start Over’ function.

Closing a Page

The ‘Page Close’ button has moved to the top left of the page. The keyboard shortcut ‘CTRL+Q’ may also be used to close the current page.

Notifications

Warnings and Errors now appear in the top right corner of the screen, below the ‘Tools’ button. Please note that they will cover the ‘Start Over’ / ‘Go’ button as well as other items in that corner of the screen until you dismiss the notification by clicking the box noting the number of errors, in the top right corner.
# Banner Keyboard Shortcuts

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

<table>
<thead>
<tr>
<th>Action</th>
<th>Banner 8</th>
<th>Banner Admin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Navigator</td>
<td>Banner Admin. keyboard shortcuts will work in Banner 8 if Application Navigator is running and the shortcut configuration settings have been applied.</td>
<td></td>
</tr>
<tr>
<td>Access Help</td>
<td>CTRL+M</td>
<td></td>
</tr>
<tr>
<td>Access Menu</td>
<td>CTRL+Y</td>
<td></td>
</tr>
<tr>
<td>Display recently opened items</td>
<td>CTRL+SHIFT+L</td>
<td></td>
</tr>
<tr>
<td>Search</td>
<td>CTRL+SHIFT+Y</td>
<td></td>
</tr>
<tr>
<td>Sign out</td>
<td>CTRL+SHIFT+F</td>
<td></td>
</tr>
<tr>
<td>Banner Document Management (BDM)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add BDM Documents</td>
<td>Icon or Menu</td>
<td>ALT+A</td>
</tr>
<tr>
<td>Retrieve BDM Documents</td>
<td>Icon or Menu</td>
<td>ALT+R</td>
</tr>
<tr>
<td>Cancel Page, Close Current Page, or Cancel Search/Query (in Query mode)</td>
<td>CTRL+Q</td>
<td>CTRL+Q</td>
</tr>
<tr>
<td>Change MEP Context</td>
<td>Not applicable</td>
<td>ALT+SHIFT+C</td>
</tr>
<tr>
<td>Choose/Submit</td>
<td>ENTER</td>
<td>ENTER</td>
</tr>
<tr>
<td>Clear All in Section</td>
<td>SHIFT+F5</td>
<td>SHIFT+F5</td>
</tr>
<tr>
<td>Clear One Record</td>
<td>SHIFT+F4</td>
<td>SHIFT+F4</td>
</tr>
<tr>
<td>Clear Page or Start Over</td>
<td>SHIFT+F7</td>
<td>F5</td>
</tr>
<tr>
<td>Copy</td>
<td>CTRL+C</td>
<td>CTRL+C</td>
</tr>
<tr>
<td>Count Query</td>
<td>SHIFT+F2</td>
<td>SHIFT+F2</td>
</tr>
<tr>
<td>Cut</td>
<td>CTRL+X</td>
<td>CTRL+X</td>
</tr>
<tr>
<td>Delete Record</td>
<td>SHIFT+F6</td>
<td>SHIFT+F6</td>
</tr>
<tr>
<td>Down/Next Record</td>
<td>Down Arrow</td>
<td>Down Arrow</td>
</tr>
<tr>
<td>Duplicate Item</td>
<td>F3</td>
<td>F3</td>
</tr>
<tr>
<td>Duplicate Selected Record</td>
<td>F4</td>
<td>F4</td>
</tr>
<tr>
<td>Edit</td>
<td>CTRL+E</td>
<td>CTRL+E</td>
</tr>
<tr>
<td>Execute Filter Query</td>
<td>F8</td>
<td>F8</td>
</tr>
<tr>
<td>Exit</td>
<td>CTRL+Q</td>
<td>CTRL+Q</td>
</tr>
<tr>
<td>Expand/Collapse Drop-down Field</td>
<td>Click field</td>
<td>ALT+Down Arrow</td>
</tr>
<tr>
<td>Export</td>
<td>Extract Data with Key or Extract Data no Key</td>
<td>SHIFT+F1</td>
</tr>
<tr>
<td>Action</td>
<td>Banner 8</td>
<td>Banner 9</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>First Page</td>
<td>Not applicable</td>
<td>CTRL+Home</td>
</tr>
<tr>
<td>Insert/CreateRecord</td>
<td>F6</td>
<td>F6</td>
</tr>
<tr>
<td>Last Page</td>
<td>Not applicable</td>
<td>CTRL+End</td>
</tr>
<tr>
<td>List of Values</td>
<td>F9</td>
<td>F9</td>
</tr>
<tr>
<td>More Information</td>
<td>ALT+H</td>
<td>CTRL+SHIFT+U</td>
</tr>
<tr>
<td>Next Field or Item</td>
<td>Tab</td>
<td>Tab</td>
</tr>
<tr>
<td>Next Page Down</td>
<td>Page Down</td>
<td>Page Down</td>
</tr>
<tr>
<td>Next Section</td>
<td>CTRL+PageDown</td>
<td>ALT+PageDown</td>
</tr>
<tr>
<td>Open Menu Directly</td>
<td>F5</td>
<td>CTRL+M</td>
</tr>
<tr>
<td>Open Related Menu</td>
<td>Not applicable</td>
<td>ALT+SHIFT+R</td>
</tr>
<tr>
<td>Open Tools Menu</td>
<td>Not applicable</td>
<td>ALT+SHIFT+T</td>
</tr>
<tr>
<td>Page Tab 1</td>
<td>Not applicable</td>
<td>CTRL+SHIFT+1</td>
</tr>
<tr>
<td>Page Tab 2 and so on</td>
<td></td>
<td>CTRL+SHIFT+2 and so on</td>
</tr>
<tr>
<td>Paste</td>
<td>CTRL+V</td>
<td>CTRL+V</td>
</tr>
<tr>
<td>Previous Field or Item</td>
<td>SHIFT Tab</td>
<td>SHIFT Tab</td>
</tr>
<tr>
<td>Previous Page Up</td>
<td>Page Up</td>
<td>Page Up</td>
</tr>
<tr>
<td>Previous Section</td>
<td>CTRL+PageUp</td>
<td>ALT+PageUp</td>
</tr>
<tr>
<td>Print</td>
<td>SHIFT+F8</td>
<td>CTRL+P</td>
</tr>
<tr>
<td>Redo</td>
<td>Not Applicable</td>
<td>CTRL+Shift+Z</td>
</tr>
<tr>
<td>Refresh or Rollback</td>
<td>SHIFT+F7</td>
<td>F5</td>
</tr>
<tr>
<td>Save</td>
<td>F10</td>
<td>F10</td>
</tr>
<tr>
<td>Search or Open Filter Query</td>
<td>F7</td>
<td>F7</td>
</tr>
<tr>
<td>Select on a Called Page</td>
<td>SHIFT+F3</td>
<td>ALT+S</td>
</tr>
<tr>
<td>Toggle Multi/Single Records View</td>
<td>Not applicable</td>
<td>CTRL+G</td>
</tr>
<tr>
<td>Undo</td>
<td>Not Applicable</td>
<td>CTRL+Z</td>
</tr>
<tr>
<td>Up/Previous record</td>
<td>Up Arrow</td>
<td>Up Arrow</td>
</tr>
<tr>
<td>Workflow</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Release Workflow</td>
<td>Icon or Menu</td>
<td>ALT+Q</td>
</tr>
<tr>
<td>Submit Workflow</td>
<td>Icon or Menu</td>
<td>ALT+W</td>
</tr>
</tbody>
</table>