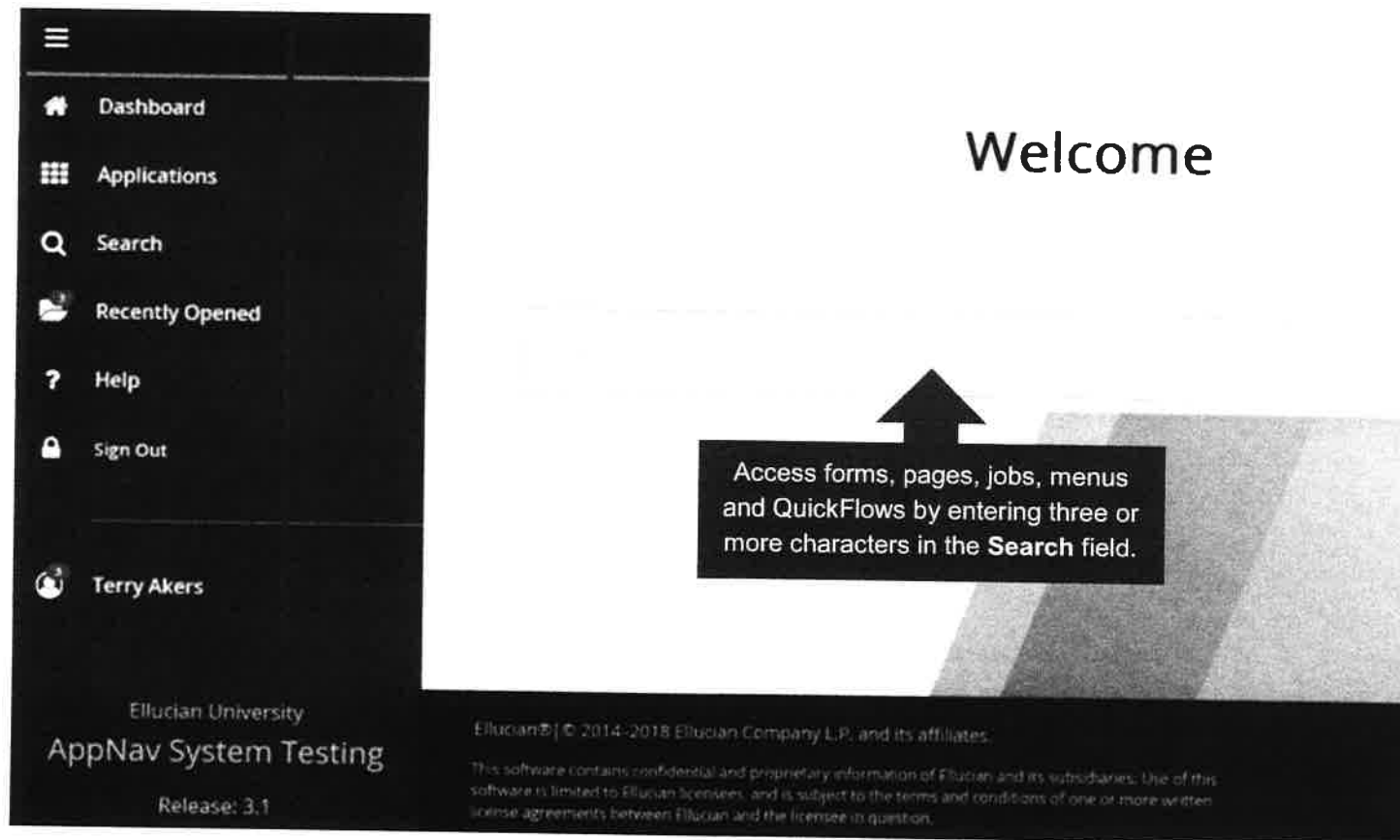


About the Landing Page

To access Banner, log on using your unique **User Name** and **Password**. On the **Landing Page**, the unified menu panel gives you access to these icons.

- **Menu:** Display/Hide icon names.
- **Dashboard:** Return to Landing Page.
- **Applications:** View Banner, My Banner, and Banner Self-Service menus plus any other integrated applications and user-defined personal links.
- **Search:** Find pages or forms using key words or the seven-letter object identifier.
- **Recently Opened:** View list of recently opened pages and forms. The number on the folder shows a count of recently opened pages. Click **Clear** to remove pages that are no longer active or have no pending changes.
- **Help:** View online help and keyboard shortcuts for Banner 9 administrative applications. Online help active only when a page is open.
- **Sign Out:** Log out of Banner.
- **User Profile:** Set user preferences such as display/alert options and colors. The number on the icon shows a count of unread Banner messages.

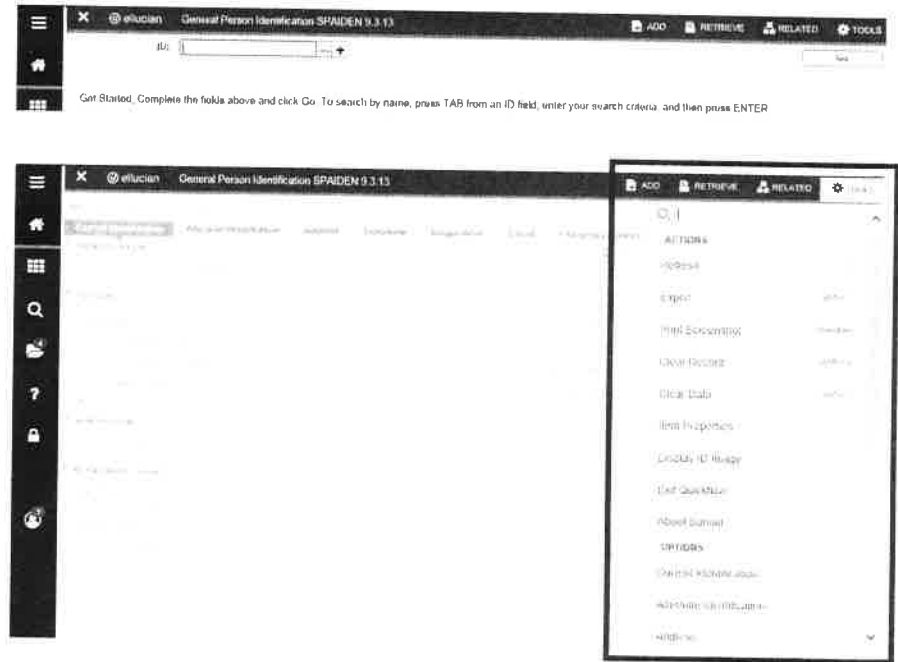


About Banner Pages

Only the **Key block** displays initially. Enter required information, then click **Go** to activate the page. Note that when the page displays the **Key block** collapses, showing only relevant information. The **Go** button is replaced with a **Start Over** button.

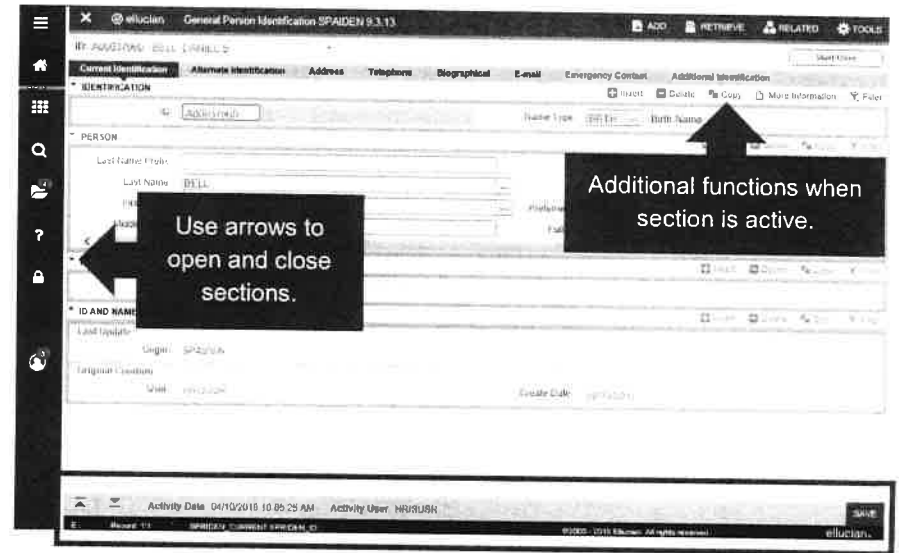
The **Page Header** provides easy access to the following functions.

- **X** icon: Close, or exit, the page.
- **ADD / RETRIEVE** icons: Used with Banner Document Management.
- **RELATED** icon: Displays a list of pages related to the active page. To access a related page, select from the list or use the **Search** field.
- **TOOLS** icon: Perform standard actions and options for the page currently displayed. Note the **Print Screenshot** link (or Ctrl+Alt+P) which renders a picture of the complete application window.



A Banner **Page** is organized as follows.

- **Tabs:** Organizes information by content area. Tabs are active unless grayed out.
- **Sections:** Provides detailed information related to the content area (**Tab**). Click in a section to activate it. When active, actions such as **Insert**, **Delete**, **Copy**, and **Filter** can be performed. Note that if *Supplemental Data Engine* is enabled, the **More Information** icon displays. If not enabled, no icon appears.



The **Page Footer** provides access to 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.

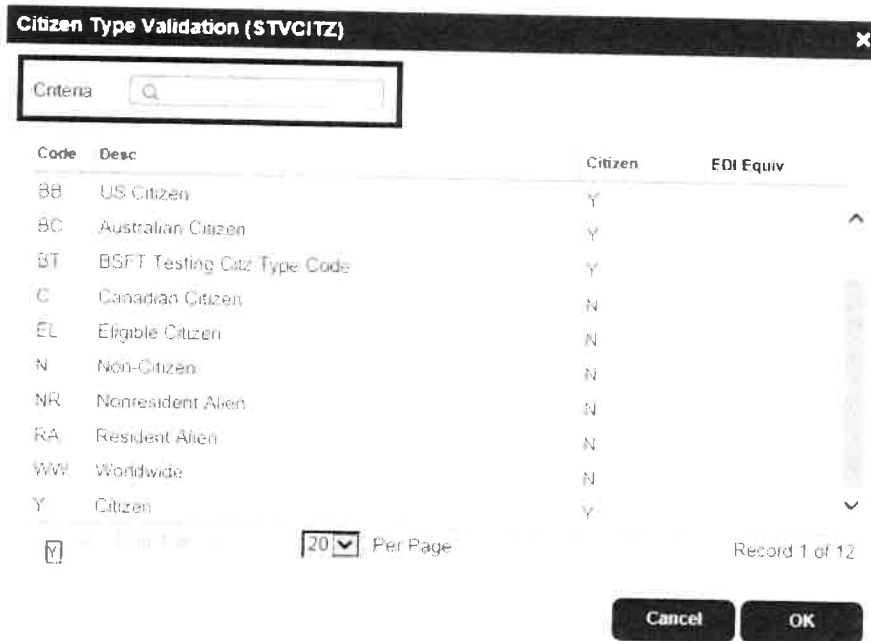
Performing a Lookup

The **Lookup** icon allows you to quickly search for a value for a field. Note that not all fields have **Lookup** icons.

1. Click the **Lookup** icon in the selected field. A list of values displays.



2. To narrow the results, type a value in the **Criteria** field then press **Enter** on your keyboard.
3. To return a value to the selected field, select the correct value and click **OK** or, double-click on the correct value.

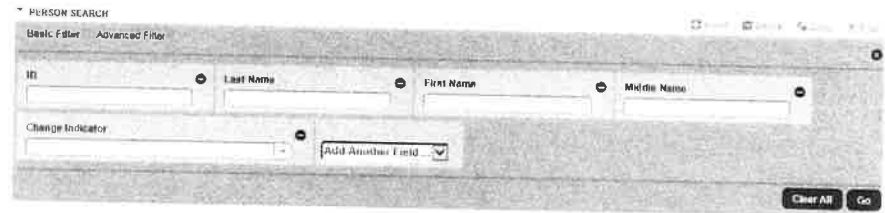


Filtering Data

You can query data 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): Uses pre-defined search fields.

1. Enter/Select a value for each field on which you want to search, then click **Go** to display the results. To return *all records* in the system, click **Go** without entering any filter criteria.
2. Click the **Filter Again** button (on the **Search Results** window) to refine your search results further.



Notes

- **Manage Search fields** – Click the field's **Minus Sign** icon to remove a pre-defined field. Click the **Clear All** button to remove all pre-defined fields. Click the **Add Another Field** drop-down arrow to create additional Search fields.
- **Use Operators** – Add operators, or wildcards, when entering data into text fields to limit results (see below). If you enter operators on a **Basic Filter** and click the **Advanced Filter** link, the operators are retained. This works in reverse as well.

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

Sample Operator Conventions

Filtering Data (cont.)

Advanced Filter: Specify filter data using SQL type operators.

1. For each field on which you want to search, click the **Operator** drop-down arrow and select the appropriate operator. 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 – 3 until all filter criteria are entered.
4. Click **Go** to display the results.
5. Click the **Filter Again** button (on the **Search Results** window) to refine results.

The screenshot shows the 'PERSON SEARCH' window with the 'Advanced Filter' tab selected. It features a 'Basic Filter' section and an 'Advanced Filter' section. The 'Advanced Filter' section contains five rows, each with a field name (ID, Last Name, First Name, Middle Name, Change Indicator), a dropdown menu set to 'Equals', and a text input field. A 'Add Another Field...' button is at the bottom left. 'Clear All' and 'Go' buttons are at the bottom right.

Searching for a Person

If you know the person's name, you can use the following search option.

1. Click in the **ID** field, then press **Tab** on your keyboard. The **ID and Name Extended Search** window displays. Narrow your search results by entering additional information in the fields provided.
2. Click the **Press to See Results** button.
3. In the blank field that displays, enter the person's last name. Press **Tab** again.
4. Select the correct record, then click **OK**.

The screenshot shows the 'ID and Name Extended Search' window. It has a 'Search Detail' section with 'Person/Non-Person Results' and 'Person Search Detail' buttons. A 'Person/Non-Person Count' of 5 is shown. There are 'Non-Person Search Detail' and 'Person Search Detail' buttons. The 'Reduce Search by' section includes radio buttons for 'Group Type' (Person, Non-Person, Both) and input fields for 'City', 'State or Province', and 'ZIP or Postal Code'. There are also input fields for 'Name Type', 'Birth Date', and 'Gender'. Instructions at the bottom read: 'Press Enter Query or select button to clear search' and 'Enter search criteria then press Execute Query or select button to reduce search'.