



# Admin Pages Navigation

Quick Reference Guide

Student Information Systems Team  
7-20-2020

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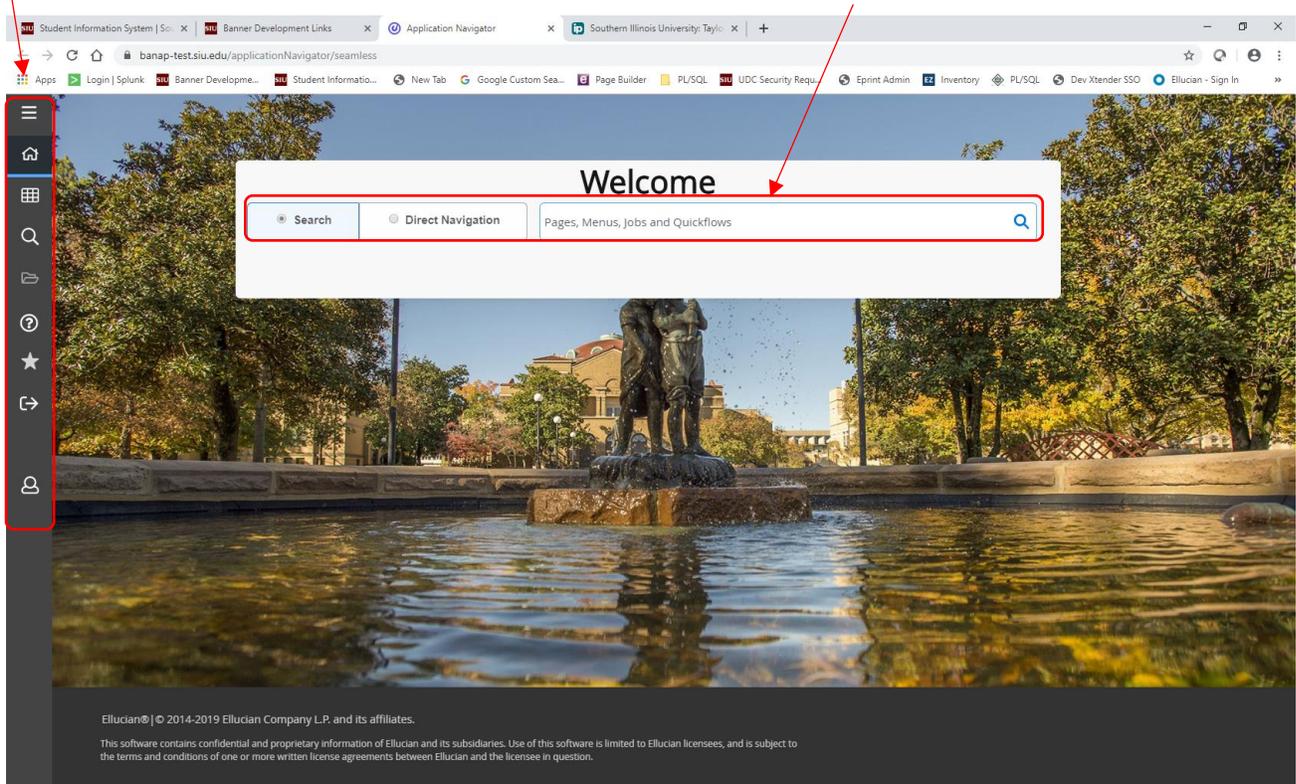
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## NAVIGATING THE LANDING PAGE

Admin Pages uses single sign-on functionality, which allows users to use their Network ID/password. The landing page (also known as Application Navigator) will be the main page where users can search or enter form names. There are two main sections of the landing page:

**Menu  
Panel**

**Search Box**



## Menu Panel:

The menu panel is always present on every page.

	<b>Toggle Menu:</b>	Provides text labels for the icons.
	<b>Dashboard:</b>	Will return user to landing page.
	<b>Applications:</b>	View Banner menu to select pages within modules (Student, Financial Aid, General), My Banner menu to select pages from the users personalized list, and My Links menu to select personal links outside of Admin Pages or objects within (defined in General User Preferences maintenance Form <b>GUAUPRF</b> ).
	<b>Search:</b>	Opens a Search window. Enter either the descriptive name or the 7-letter Banner acronym. (Results display after entering three characters.)
	<b>Recently Opened:</b>	View a list of recently opened pages. A number on the folder shows a count of recently opened pages.
	<b>Help:</b>	View online help for Banner Admin Pages. (The <b>Help</b> icon is active only when a page is open.)
	<b>Favorites:</b>	Favorites allows you to add frequently accessed objects to a convenient list.
	<b>Sign Out:</b>	Click to log out of the application.
	<b>User:</b>	User Profile menu includes Check Banner Messages, My Preferences, and Personal Settings

## Search Box:

You can choose whether to use Search or Direct Navigation to access pages, jobs, menus and quickflows. This choice can be saved in the Personal Settings Menu.

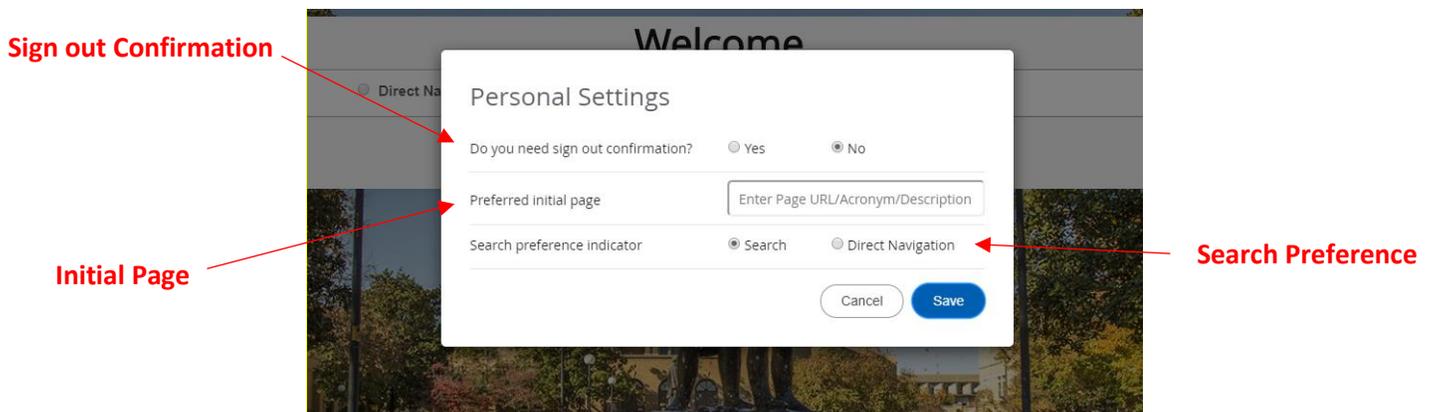
## Search

Search for pages, jobs, menus, and quickflows by entering three or more characters in the Search field. Users can enter either the descriptive name or the Banner acronym. As you type you will see options drop down to help you locate the object you are looking for.

## Direct Navigation

Direct Navigation will allow you to access pages, jobs, menus, and quickflows directly. You must know the name or complete description of your object. You may enter the 7-letter object identifier or acronym for a page, or the complete description. If there are no matching records available a 'No Results Found' message will be displayed. Options will not open to help you search like they do with the Search function.

## Personal Settings:



The Personal Settings link is under the user profile icon in the Menu Panel of the Landing Page. Personal Settings can be used to define the initial page, the search preference, and to configure sign out confirmation.

### Initial Page

The Initial Page is the first page that will be opened for the user when they log into Admin Pages. The default is set to the 'Welcome' Landing Page. Users can identify the page description or seven-letter identifier for an Administrative page; the description or URL for a Self-Service page; or the description or URL for a page builder page.

### Search Preference

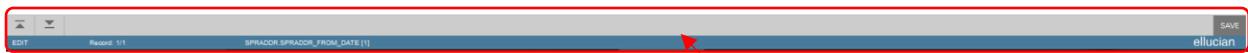
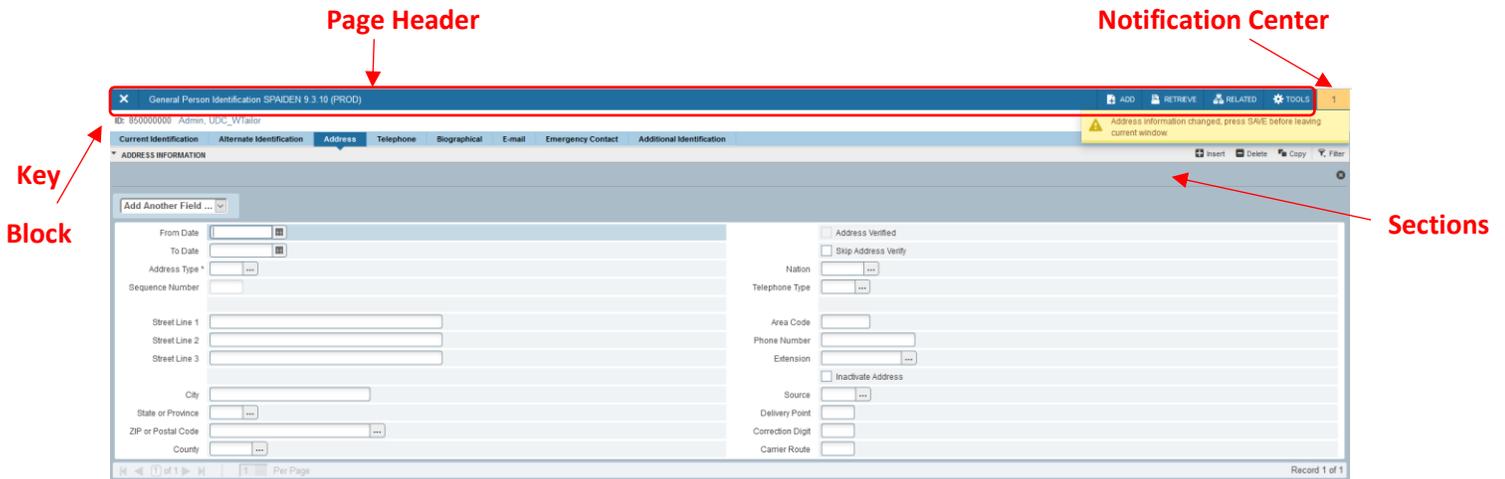
Users can select **Search** or **Direct** as the default option to be used.

### Sign Out Confirmation

Users can select **Yes** to be prompted with a sign out confirmation message when signing out of Admin Pages. The default setting is **No**.

## BASIC NAVIGATION

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



**Bottom Section Navigation**

### Page Header:

The page header is part of the basic navigation and contains the following terms:



**Page Close:**

Closes current open page.



**Page Title:**

Displays the descriptive name, the Banner acronym and version of page.



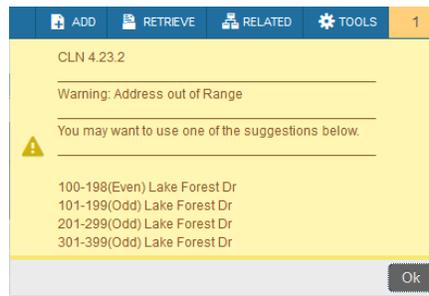
**Add:**

Used with Xtender to add an image.

	<b>Retrieve:</b>	Used with Xtender to query list of images.
	<b>Related:</b>	Displays a list of pages that can be accessed from this page.
	<b>Tools:</b>	Includes refresh, export, print, clear record, clear data, item properties, display ID image, 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:

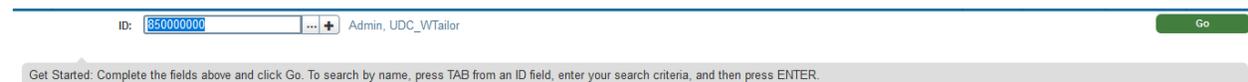


- Successful save of data (displayed in green)
- Warning messages (displayed in yellow)
- Error message (displayed in red)
- Information messages (displayed in blue)
- Number of messages to be corrected to continue in the page.

Users 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 on the key block, the fields that can be entered in the key block are enabled. When a user leaves 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 the user leaves the key block by clicking the **Go** button, the data is rearranged into a linear format.

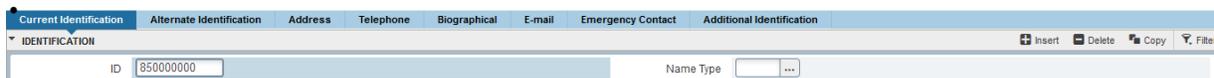
To access the body of the page, populate the key block data and then click **Go**.

Users can return to the key block if the user is on the body of the page by clicking **Start Over**.

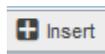
### Sections:

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. 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.



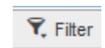
**Delete:**

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.

### Bottom Section Navigation:

The bottom of the section of the page contains icons to be used for navigation, perform functions, and display additional information.



**Previous Section:**

Will take users backwards in sections.



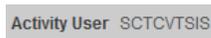
**Next Section:**

Will take users to the next section of the page.



**Activity Date:**

Time stamp for the record if created or modified.



**Activity User:**

Name of user creating or modifying the record.



**Save Button:** Button users will use to save data.

**Required Fields:**

An asterisk (\*) displayed next to a field name indicates that the field requires a value before you continue. If a user leaves 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.

Term *	Term Description *	Term Start Date *	Term End Date *
999999	The End of Time	01/01/2999	05/15/2999
202520	Spring 2025	01/21/2025	05/16/2025

**Sort Order:**

In a grid layout, values from 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. Users can click the field label to reverse the sort order.

Term * ▲	Term Description *	Term Start Date *
000000	The Beginning of Time	01/01/1900
192020	Winter-Spring 1920	01/01/1920
192040	Summer 1920	06/16/1920

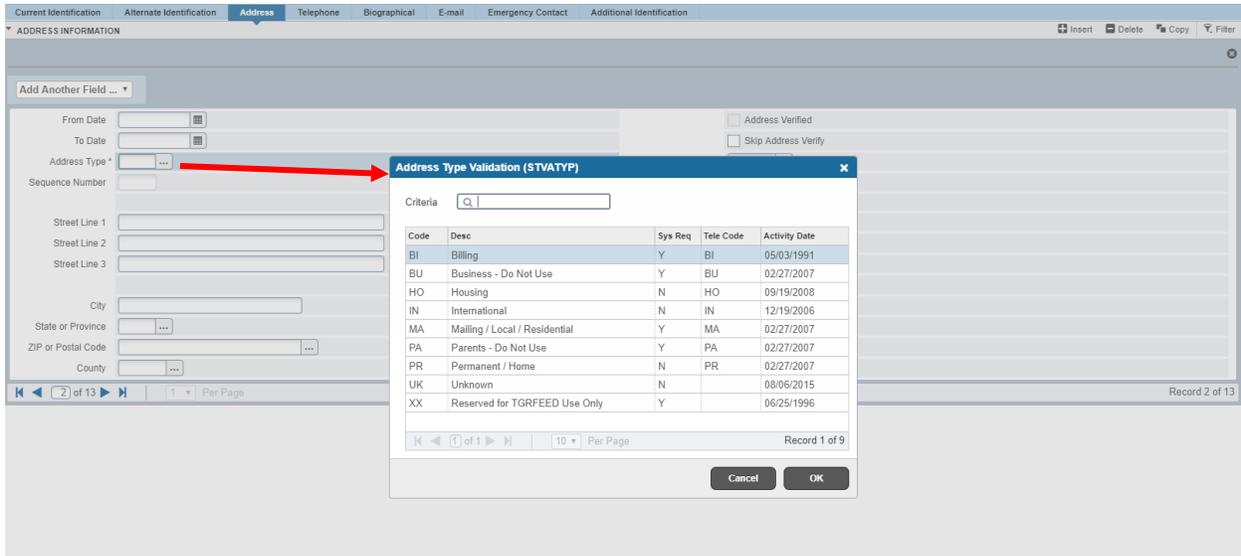
**Dates:**

Users can either enter the date directly or use the calendar icon for date select. The date format is mm/dd/yyyy. To enter the current date, type any letter and [TAB].

**Search:**

The Search feature allows users to quickly look up a value for a field. The Search button  next to a field indicates that the field has the Search feature.

Click the **Search** 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:**

Users can filter data in a section if there is an active Filter icon in the section header. Use the following steps to filter data in a section.

The filter function has two options: **Basic Filter** and **Advanced Filter**. If filtering is available (the icon is not grayed out), you can click on it to open the defaulted Basic Filter screen.

*Basic Filter*

**Basic Filter** has a few key fields to filter your data. You can also add another field to filter by to narrow your search result.



1. Click the active Filter (F7) icon for the section.
2. Enter a value for the field you selected.
3. Pres F8 or **Go** to display results.

**Optional:** To add another field click the arrow to open the drop-down menu of options you may select from. You may add more than one field; repeat this step until all desired fields have been selected.

### *Advanced Filter*

**Advanced Filter** has the option of more qualifiers, “Equals, Contains, Starts With, etc.” This allows you to get more specific with your search.

1. Click the active Filter (F7) icon for the section.
2. Click on Advanced Filter wording to open that function.
3. Enter values for field you selected.

The Contains operator is available for alphanumeric and other fields only. The Between operator includes the values entered. For example, for records “between” 1 and 5, the values 1, 2, 3, 4, and 5 are considered. Required fields do not use the Is Null or Is Not Null operators.

4. Pres F8 or **Go** to display results.

**Optional:** Users can click filter again to perform another filtered search

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

**Multiple Records:**

- **Multiple Records.** In this instance, the data is presented in column and row or grid format. Users may need to scroll to view all the data. Users can page through the records using the blue arrows (pagination controls) or by typing the page number in the box.

**Note:** These controls only work when using the Multiple Records view. These controls do NOT work in the single record view. Decide how many records to review in the grid and sort the data in ascending or descending order.

Term *	Term Description *	Term Start Date *	Term End Date *	Term Type	Academic Year *	Housing Start Date *	Housing End Date *	Financial Aid Process Year	Summer
999999	The End of Time	01/01/2999	05/15/2999		9999	01/01/2999	05/15/2999	9999	<input type="checkbox"/>
202520	Spring 2025	01/21/2025	05/16/2025	S	2025	01/21/2025	05/16/2025	2425	<input type="checkbox"/>
202460	Fall 2024	08/19/2024	12/13/2024	S	2025	08/19/2024	12/13/2024	2425	<input type="checkbox"/>
202440	Summer 2024	06/10/2024	08/02/2024	M	2025	06/10/2024	08/02/2024	2324	<input type="checkbox"/>
202420	Spring 2024	01/16/2024	05/10/2024	S	2024	01/16/2024	05/10/2024	2324	<input type="checkbox"/>

- **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. The down arrow on the keyboard moves you to the next record. If you want to go back to the previous record use the up arrow on the keyboard.

Term: 999999  
 Term Description: The End of Time  
 Term Start Date: 01/01/2999  
 Term End Date: 05/15/2999  
 Term Type: ...  
 Academic Year: 9999  
 Housing Start Date: 01/01/2999  
 Housing End Date: 05/15/2999  
 Financial Aid Process Year: 9999  
 Process Year:  Summer  
 Term:   
 Beginning Period:   
 Ending Period:   
 System Required

**Data Export:**

Users can export data from a Banner Admin Page to an Excel spreadsheet by clicking **Tools -> Export**.

**Item Properties:**

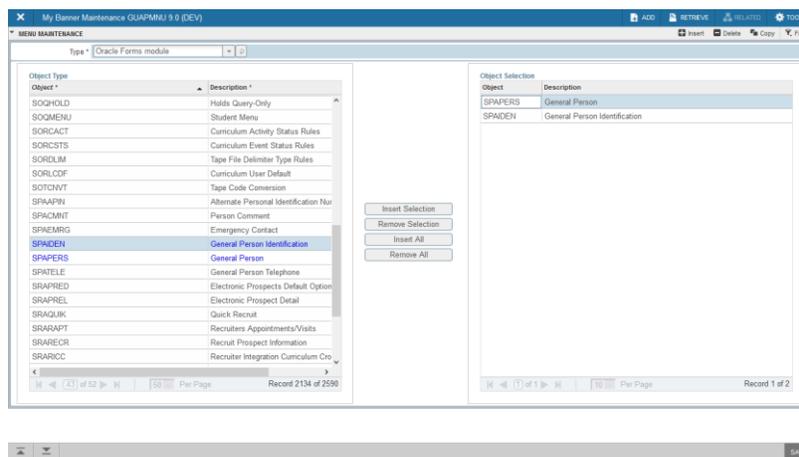
Item Properties lists all properties for the field where the cursor is currently located. Item properties include the field’s internal database name, whether it is required, type of data (character or numeric), maximum length, and other characteristics of the field. The specific properties that are displayed depend on the type of field. To display Item Properties for a field, place the cursor in the field and select **Tools -> Item Properties**.

## MY BANNER – MENU PERSONALIZATION

The My Banner menu allows you to save your most used Admin Pages to a personal menu accessible from the menu icon (CTR + M) on any Admin Page. Follow the instructions below to set up your My Banner menu.

### Instructions to Set Up My Banner:

1. Go to the GUAPMNU page.

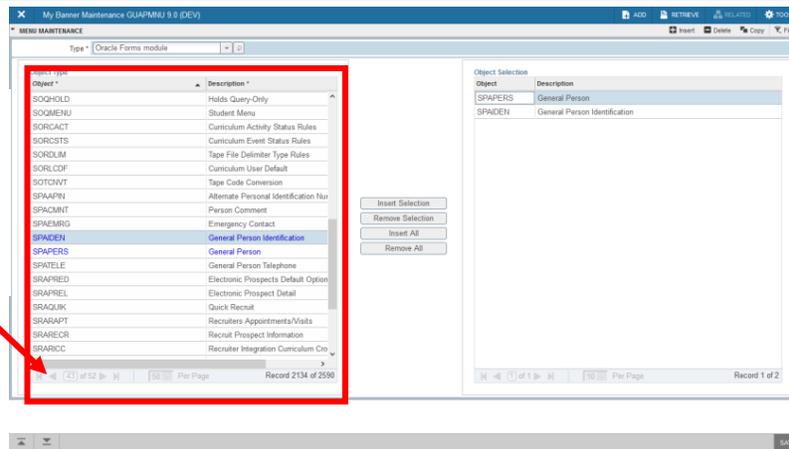


2. In the Type field, choose **Oracle Forms module** for the Forms/Pages.

On the Left is a list of pages that you may want to add to the 'My Banner' menu as a shortcut. You can use the arrows to scroll through the names or you can use the Filter function (F7) to narrow down your search.

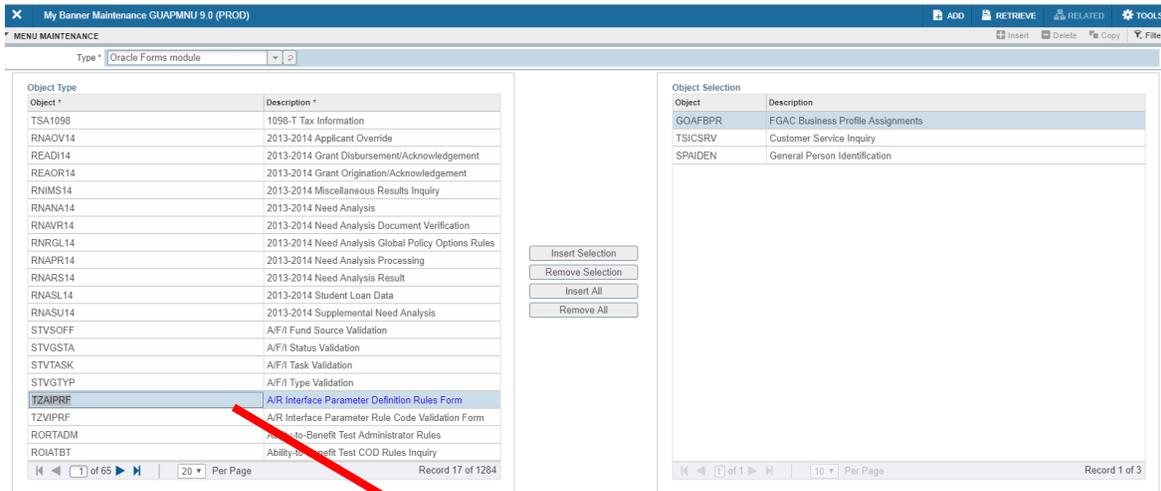
On the Right is a list of pages that are ALREADY in your 'My Banner' menu as a shortcut.

Use the Next Record arrows to scroll through if you choose not to use the Filter Tool



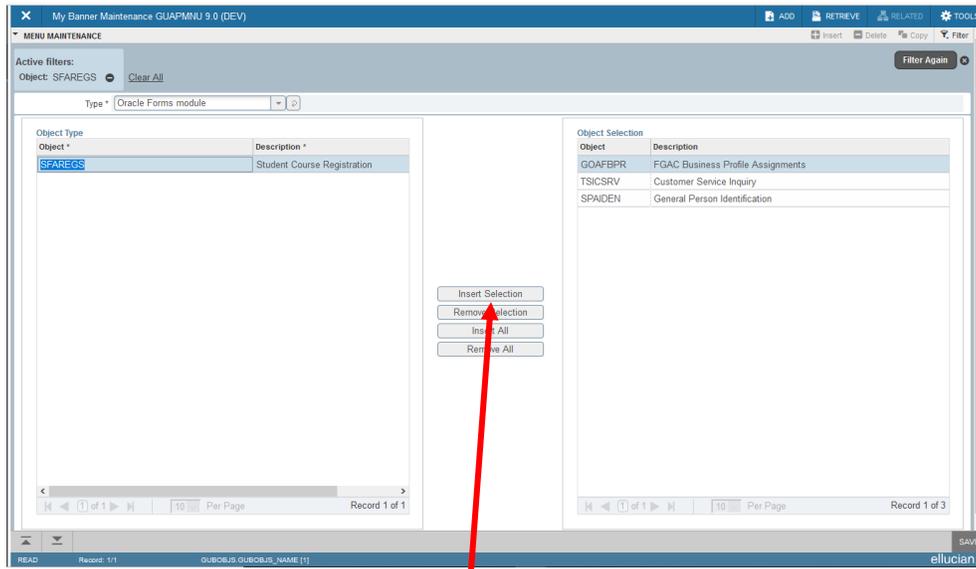
Use the Filter Tool to search for specific names of pages or description

- To add a page you will need to double click on the page you want to add from the box on the Left. When you double click the Object and Description font will be blue.



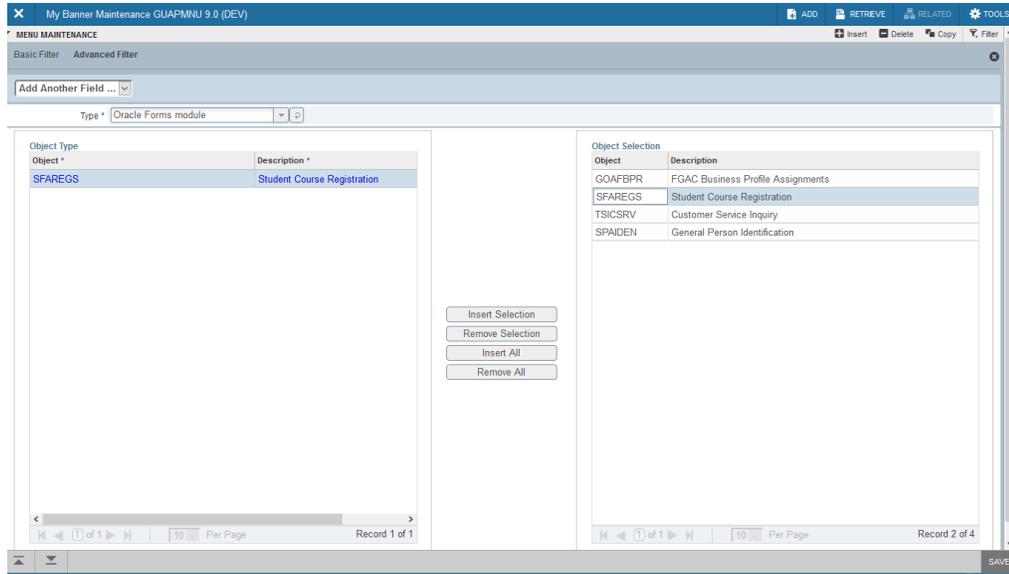
**TZAI PRF** A/R Interface Parameter Definition Rules Form

- Once you have completed your selection of pages you want to add to My Banner, click **Insert Selection**.

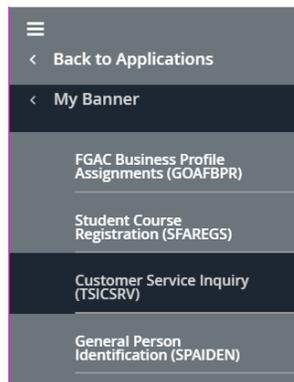


Insert Selection

- After clicking Insert Selection, the object will also be viewed on the right. Click **Save**. A save notification will confirm the saved changes.



- To view your changes to My Banner, you must either log out or close your browser and reopen. Once you have done this, go back to the landing page. Click on the **Applications icon** and then **My Banner**. You will now see your newly added My Banner pages.



## FAVORITES

You can add any of the pages or objects listed under the Applications menu as a favorite by clicking on the star icon alongside that object. To remove the object from the list of favorites, click the star icon alongside it in the favorites list. A shortcut key to access favorites is Ctrl + D.

## PERSON SEARCH

### Instructions to Search for a Person on SPAIDEN:

There are two ways to execute a person search, the TAB key on the keyboard and the Search button. Both options will send you to the person search page (SOAIDEN).

#### TAB Key:

1. Place your cursor in the ID field.

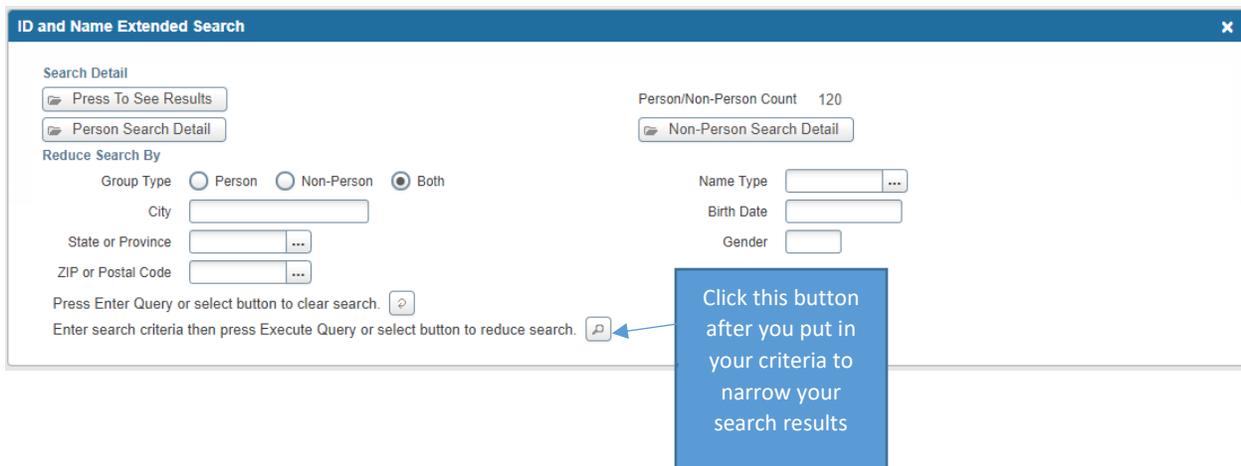


2. Click the **Tab** key and type the name into the field that appears. Press **Enter**.



3. The ID and Name Extended Search message box appears. In this example, you can see there are 120 matches to my name in the Person Count.

With this filter, you have several options.



- a. To reduce the search even more on the ID Name and Extended Search message box, go to the **Reduce Search By** section, enter criteria such as City, State or Province, ZIP or Postal Code, Birth Date, Gender, etc., and then click on the magnifying glass icon (🔍) beside **Enter search criteria then press Execute Query or select button to reduce search**. In the example, we entered IL in the State or Province field and clicked the magnifying glass icon. This reduced the number of records from 120 to 25.

- b. Click on **Press to See Results** button. This will display another message box with the name and ID. These are the results of your filter from the previous screen.

- c. To see all of the person records for the name you entered regardless of filtering selections, click on **Person Search Detail** to see detailed information on all person records that have a similar name.

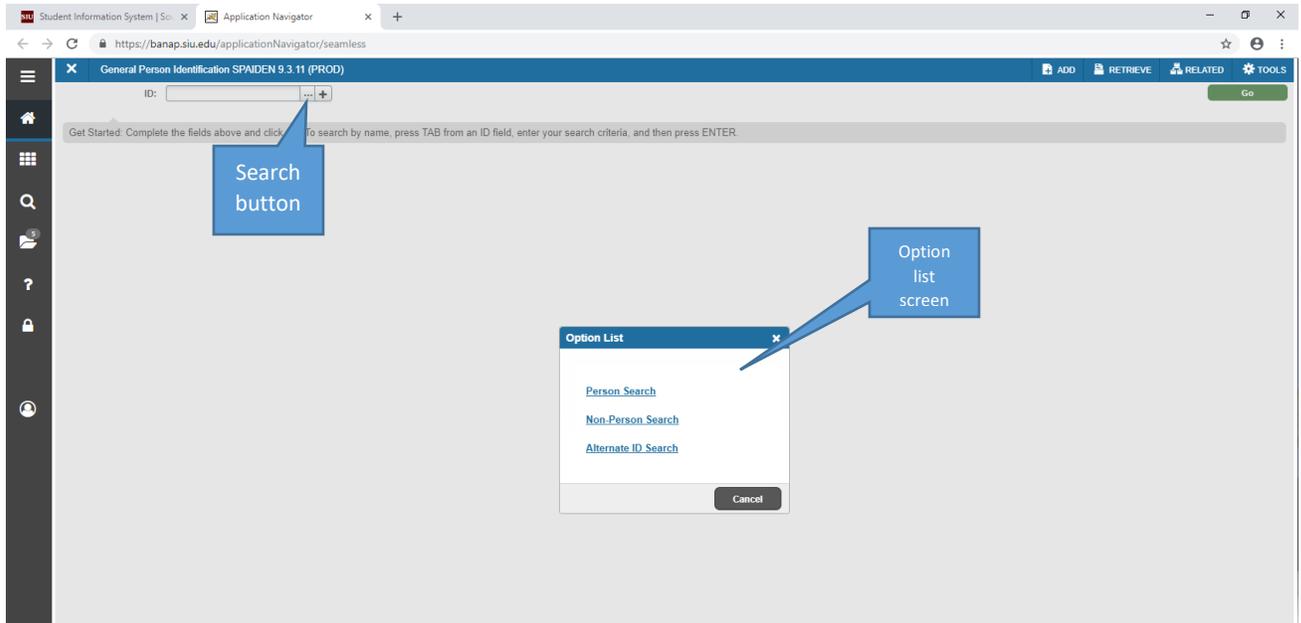
**Note:** If at any time you want to clear your filtered criteria, click on the clear search icon



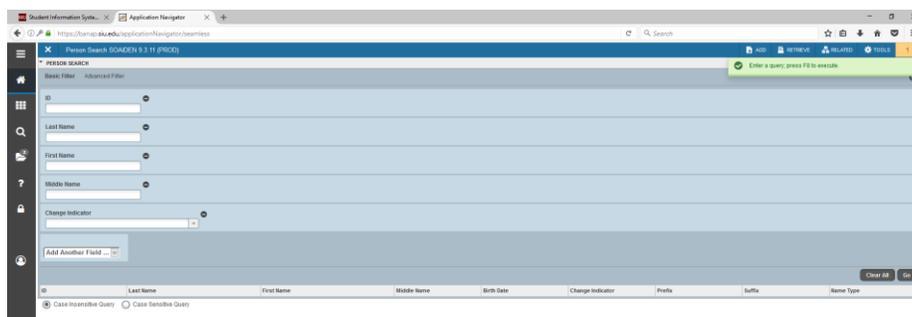
beside the **Press Enter Query or select button to clear search**.

**SEARCH Button:**

1. Click the SEARCH button next to the ID field. This opens the search option list where you can select person search. This will take you to the person search details screen.



2. Enter the name information in the filter criteria fields, the filter function opens automatically when you click Person Search from previous screen. (Note: This is just like doing a basic filter as discussed previously in this document, only it is on the SOAIDEN, or Person Details Screen.) Click **Go** to display the results below.



**Person Search Details SOAIDEN:**

1. Both **Person Search Detail** button using **TAB** function and **Person Search** option using **SEARCH Button** function will take you to the page SOAIDEN, which displays the data from the person search. This will show the individual's ID, Last Name, First Name, Middle Name, Birthdate, etc. When you use the search button to get to SOAIDEN the filter screen will



## TIPS AND TRICKS

- ✓ Best Feature: Zoom in Banner

**CTRL =** increase zoom

**CTRL –** decrease zoom

**CTRL 0** resets zoom to 100%

- ✓ Tip: Export Data from Banner Admin Pages under the Tools menu
- ✓ Tip: Admin Pages works best in a web browser other than Internet Explorer. Try Edge, Chrome, or Firefox.
- ✓ Tip: When conducting Queries, the % and \_ are wildcards.

Percent (%) is any number of characters - %Q% is any page with a Q

Underscore (\_) is a single character - \_\_Q% is any page with a Q in the 3<sup>rd</sup> position.

- ✓ Trick: Use the Related Menu to access pages and functions related to the page you are using.