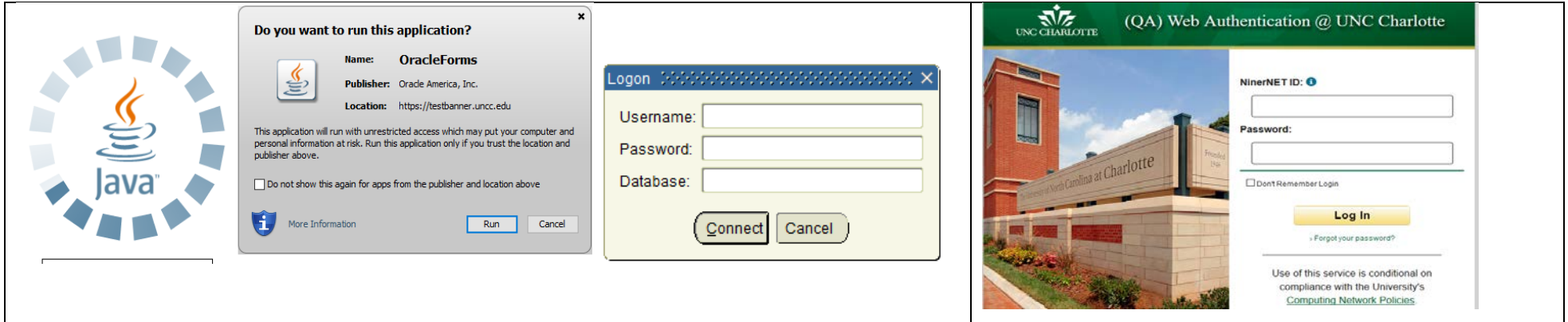


BANNER OLD ("Forms") & NEW ("Administrative Pages")

What do you see when logging in?

OLD = Java,

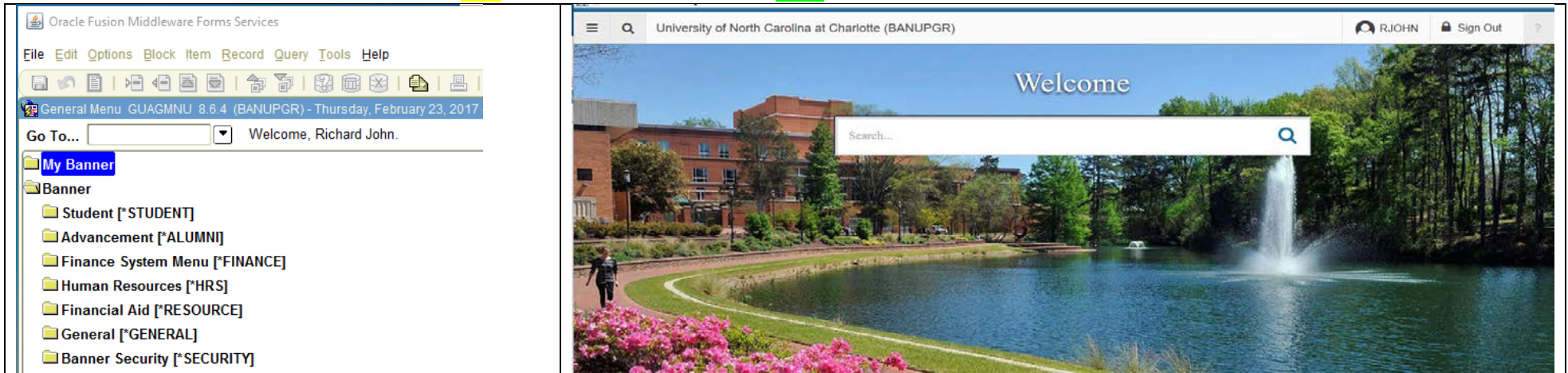
NEW = no Java, only the browser



What does the Banner home page look like?

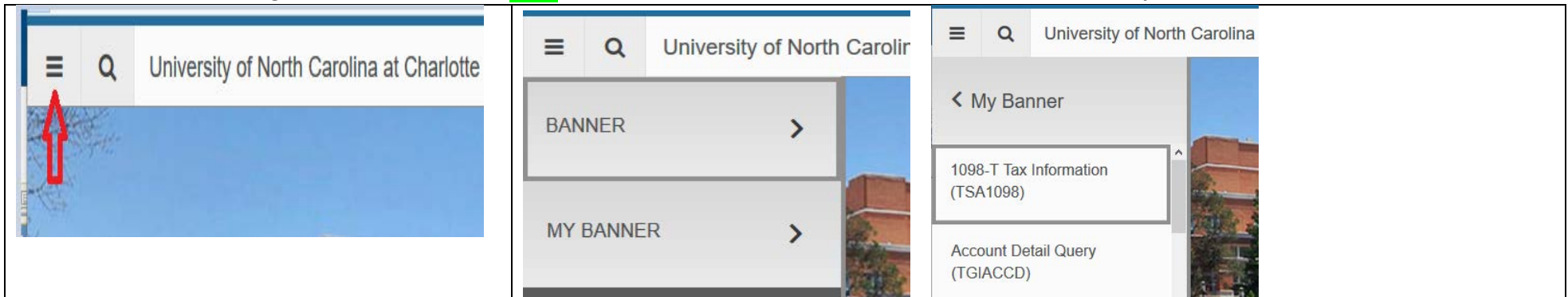
OLD

NEW



Where are the menus of Pages/Forms?

NEW, click the 3 horizontal bars to see the menus; click the > to open the menu, and the < to close it



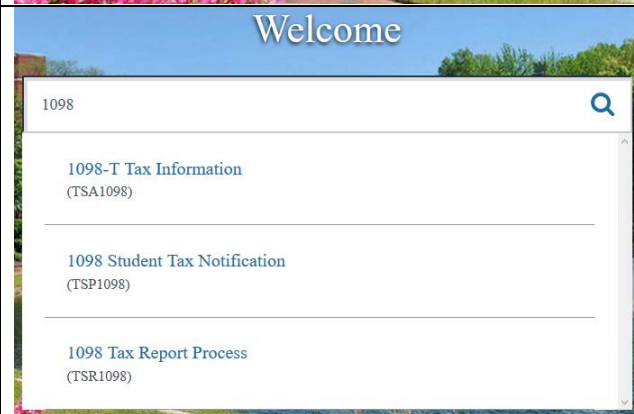
So what is that big Search box under Welcome?

NEW

If you start typing the Page name there, Banner will start showing possible choices; when you see the one you want you can either keep typing the Page name and hit Enter, or click on the choice in the list

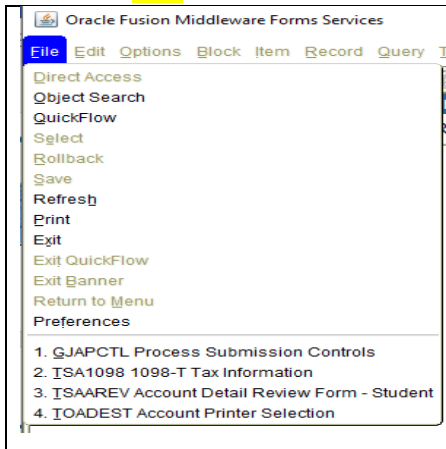


You can also search using the title or part of a title of a Page

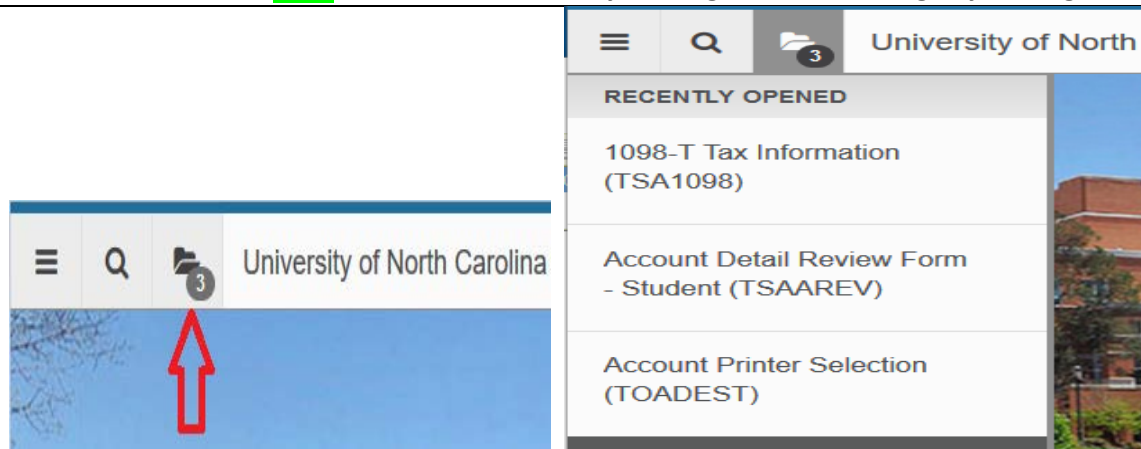


Does Banner still keep track of the Pages/Forms I use?

OLD, click the File menu



NEW, click the Folder icon; you can go back to the Page by clicking it



How do I set the printer I want to use? **OLD**

Account Printer Selection TOADEST 8.0 (BANUPGR)

Printer Destinations

Invoices:

Receipts:

Student Summary:

Clicking the down arrow showed a list to pick from

Printer Validation (GTVPRNT)

Find %

Code	Description
priapp1	Financial Services - 3rd Floor
pricsh1	Cashier Printer 1
pricsh2	Cashier Printer 2
pricsh3	Cashier Printer 3
pricsh4	Cashier Printer 4
pricsh5	Cashier Printer 5
pricsh6	Cashier Printer 6
prinv1	Grants Billing Printer 1

Find OK Cancel

NEW

University of North Carolina at Charlotte (BANUPGR)

Account Printer Selection TOADEST 9.3 (BANUPGR)

ADD RETRIEVE RELATED TOOLS

PRINTER DESTINATIONS

Invoices

Receipts

Student Summary

And clicking the 3-dot icon shows a list to pick from

Printer Validation (GTVPRNT)

Criteria

Code	Description	Printer Comm
DATABASE	Database	
NOPRT	Null Printer	lp -o noban
SFPCPOS_PRNT	Printer set up for SFPCPOS	Not Used b
SHRPESE_PRNT	Printer set up for SHRPESE	Not Used b
SHRPESI_PRNT	Printer set up for SHRPESI	Not Used b
adm0009prn	Undergraduate Admissions 9	
adm0010prn	Undergraduate Admissions 10	
adm0014prn	Undergraduate Admissions 14	
catohall108	Admissions Admin Office	

1 of 4 | 20 Per Page | Record 1 of 77

Cancel OK

What are the blue & gray arrow controls at the bottom of the Page? **NEW**

You can pick how many records to display at a time; the arrows let you move forward or backward, or to the beginning or end of the list

1 of 4 | 20 Per Page | Record 1 of 77

How do the NEW Pages work?

If you know the 800 number you can use it,

or you can search for the student: **OLD**, using the down arrow

NEW, using the 3-dot icon

Account Detail Review Form - Student TSAAREV 8.5.0.1 (BANUPGR)

ID:

User: RJOHN

Account Details

Detail Code

Option List

- Person Search (SOAIDEN)
- Non-Person Search (SOACOMP)
- Alternate ID Search (GUIALTI)

Cancel

Person Search SOAIDEN 8.5.6 (BANUPGR)

ID	Last Name
<input type="text"/>	TestBanner9
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

To launch the search, press F8 or click the Query icon (to the right of the ?)

University of North Carolina at Charlotte (BANUPGR)

Account Detail Review Form - Student TSAAREV 9.3 (BANUPGR)

ID: ...

User: RJOHN

Option List

- Person Search (SOAIDEN)
- Non-Person Search (SOACOMP)
- Alternate ID Search (GUIALTI)

Cancel

Person Search SOAIDEN 9.3 (BANUPGR)

PERSON SEARCH

Add Another Field ...

- Add Another Field ...
- ID
- Last Name
- First Name
- Middle Name
- Change Indicator
- Name Type

Case Sensitive Query

You can pick the field to use for the search with the Down arrow ...

NEW

And then pick how to compare with that Down arrow ...

Person Search SOAIDEN 9.3 (BANUPGR)

PERSON SEARCH

Last Name [v] Contains [v] []

Add Another Field ... [v]

- Contains
- Starts With
- Ends With
- Equals
- Not Equal

Case Insensitive Query Case Sensitive Query

**And then type your value and click GO or F8
(you don't need to use % as a wild card any more)**

Person Search SOAIDEN 9.3 (BANUPGR)

PERSON SEARCH

Last Name [v] Ends With [v] Banner9 []

Add Another Field ... [v]

Case Insensitive Query Case Sensitive Query

A search using 2 fields would look like this ...

Person Search SOAIDEN 9.3 (BANUPGR)

PERSON SEARCH

Last Name [v] Starts With [v] Test []

ID [v] Starts With [v] 800 []

Add Another Field ... [v]

Clear All Go

Case Insensitive Query Case Sensitive Query

NEW

And the result would look like this; if you wanted to search again, maybe to reduce the number of choices, just click Filter Again

Person Search SOAIDEN 9.3 (BANUPGR)

PERSON SEARCH

Filter Again

ID	Last Name	First Name	Middle Name	Birth Date	Change In...	Prefix	Suffix	Name...
800729125	Test	Taryn						
800728949	Test	Tekisha	M					
800884990	Test3	Test		02/01/90				
800938764	TestBanner9	Richard	Q	01/13/98				

Double click the ID/800 number of the student you want to select

The ID number will be inserted on the Page you started the search from ...

University of North Carolina at Charlotte (BANUPGR)

Account Detail Review Form - Student TSAAREV 9.3 (BANUPGR)

ID: 800938764

Credit Limit:

Richard Q TestBanner9

User: RJOHN

Holds:

Go

Get Started: Fill out the fields above and press Go.

What can you do with all of the choices on this Page?

To log off of Banner,

OLD

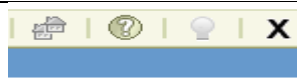
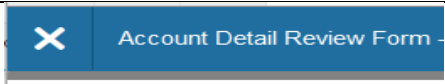
NEW

<p>Click the X in the Menu bar twice</p> 	<p>Click the Sign Out icon</p> 
---	---

To close this particular Page,

OLD

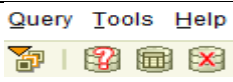
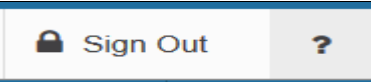
NEW

<p>Click the X in the Menu bar once</p> 	<p>Click the X next to the Page Title</p> 
--	--

Get Help information for the Page,

OLD

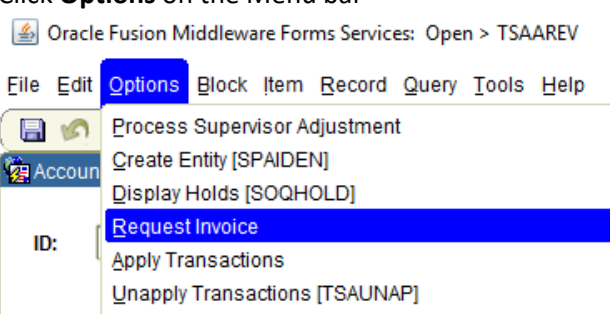
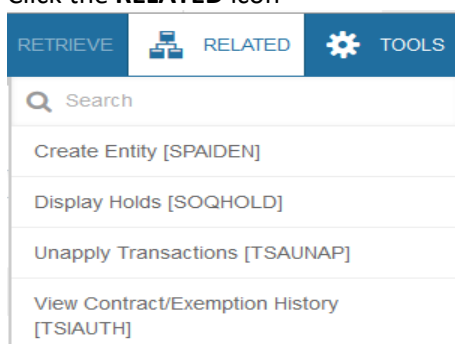
NEW

<p>Click Help on the Menu bar</p> 	<p>Click ? to the right of Sign Out</p> 
--	--

See other Pages of related information that you can use,

OLD

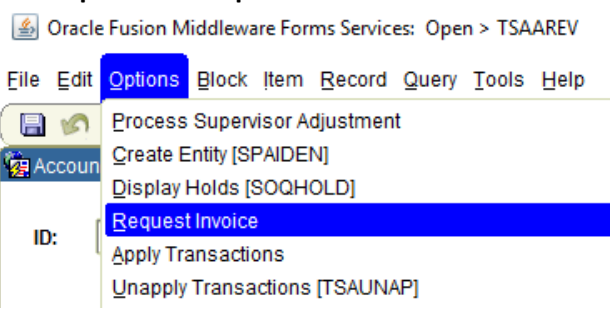
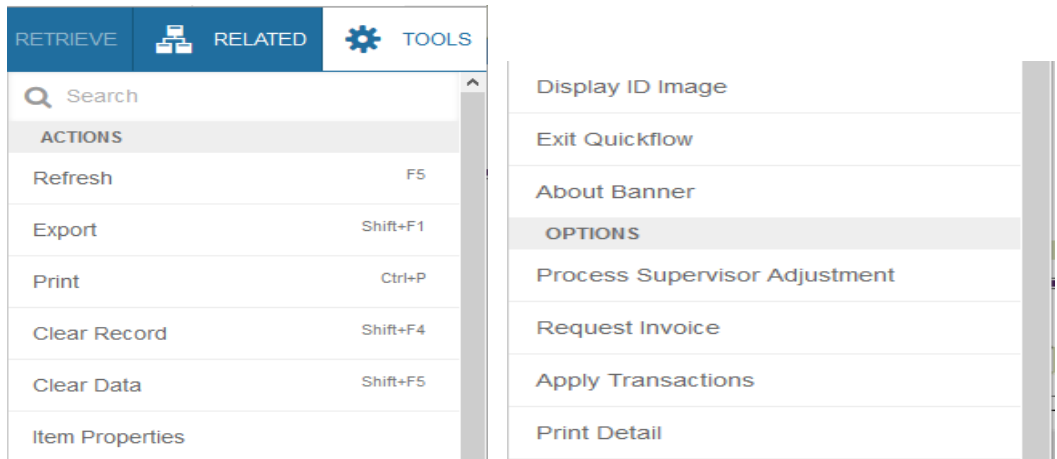
NEW

<p>Click Options on the Menu bar</p> 	<p>Click the RELATED icon</p> 
--	---

See other actions that you can take,

OLD

NEW

<p>Click Options or Help on the Menu bar</p> 	<p>Click the TOOLS icon</p> 
--	--

NEW

Go

Go (Alt+PageDown)

To see data on the Page after you fill in the key information, just click Go (Alt+PageDn)

Activity User BANWOR

Next Section (Alt+PageDown)

or the Down arrow

Account Detail Review Form - Student TSAAREV 9.3 (BANUPGR)

ID: 800938764 Richard Q TestBanner9 Credit Limit: User: RJOHN Holds: Start Over

ACCOUNT DETAILS

Receipt

Detail Code *	Description *	Term *	Charge	Payment	Balance	Source *	Effective Date *	Transaction D
B113	Fed Direct Unsubsidized Loan	201710		2,721.00	0.00	F	01/03/2017	01/03/2017
2210	Payment Plan Enrollment Fee	201710	55.00		0.00	W	12/06/2016	12/06/2016
0015	Web Payment-ACH	201710		721.00	0.00	W	12/06/2016	12/06/2016
0015	Web Payment-ACH	201710		5.00	0.00	W	12/06/2016	12/06/2016
4039	Hunt Double Suite	201710	3,910.00		3,904.50	T	12/05/2016	12/05/2016
4601	Meal Plan 175 Block	201710	2,090.00		2,090.00	T	12/05/2016	12/05/2016
1550	Health Insurance Waiver	201710		1,111.00	0.00	E	11/04/2016	11/04/2016
1000	Tuition Undergrad Resident	201710	467.12		0.00	R	11/04/2016	11/04/2016
1000	Tuition Undergrad Resident	201710	1,401.38		0.00	R	11/04/2016	11/04/2016
5041	Student Health Premium	201710	1,111.00		0.00	R	11/04/2016	11/04/2016

1 of 4 Per Page Record 1 of 39

BALANCE DETAILS

Query Balance	5,994.50	Authorized Aid Balance	0.00
Account Balance	5,994.50	NSF	0
Amount Due	5,994.50	Receipt?	N
Memo Balance	-3,993.00		

Activity User BANWORX SAVE

- If a column title has an * (like Detail Code *), you can click on it to sort ascending or descending

NEW

You can use the Filter icon to search for & display only records with certain information

Account Detail Review Form - Student TSAAREV 9.3 (BANUPGR) | ADD | RETRIEVE | RELATED | TOOLS | 1

ID: 800938764 Richard Q TestBanner9 Credit Limit: User: RJOHN Holds:

Enter a query; press F8 to execute.


ACCOUNT DETAILS | Insert | Delete | Copy | Filter

Add Another Field ...

- Add Another Field ...
- Detail Code
- Description
- Term
- Balance
- Source
- Effective Date
- Transaction Date
- Aid Year
- Period
- Receipt
- Original Charge
- Contract Detail
- Trans Number
- Trans Paid
- Document
- Invoice Number
- Invoice Paid
- Feed
- Feed Doc Num

Transaction Date	0.00	Authorized Aid	0.00
Original Charge	5,994.50	Balance	
Trans Number	5,994.50	NSF	0
Invoice Number	0.00	Receipt?	N

Clear All | Go



Type in your selection rules, and click Go (Alt+PageDn)

Account Detail Review Form - Student TSAAREV 9.3 (BANUPGR) | ADD | RETRIEVE | RELATED | TOOLS

ID: 800938764 Richard Q TestBanner9 Credit Limit: User: RJOHN Holds: | Start Over

ACCOUNT DETAILS | Insert | Delete | Copy | Filter

Term | Equals | 201680

Add Another Field ...

Clear All | Go

NEW

Account Detail Review Form - Student TSAAREV 9.3 (BANUPGR)

ADD RETRIEVE RELATED TOOLS

ID: 800938764 Richard Q TestBanner9 Credit Limit: User: RJOHN Holds: Start Over

ACCOUNT DETAILS Insert Delete Copy Filter Filter Again

Receipt

Detail Co...	Description *	Term *	Charge	Payment	Balance	Source *	Effective Date *	Transactio
0005	Web Payment-Visa	201680		755.00	0.00	W	08/15/2016	08/15/2016
0015	Web Payment-ACH	201680		2,030.16	0.00	W	10/31/2016	10/31/2016
0015	Web Payment-ACH	201680		2,020.17	0.00	W	08/30/2016	08/30/2016
0015	Web Payment-ACH	201680		2,020.17	0.00	W	09/15/2016	09/15/2016
1000	Tuition Undergrad Resident	201680	1,868.50		0.00	R	07/07/2016	07/07/2016
1550	Health Insurance Waiver	201680		1,111.00	0.00	E	08/01/2016	08/01/2016

To move between sections of data on the same Page, either use the Up and Down arrow keys, click in the section you want to be in, or use Alt+PageUp and Alt+PageDown

Start Over

Start Over (F5)

To look up data for another student, click Start Over

To easily download the data on a Page to Excel, click Export under the TOOLS icon and then OK in the following dialog box

RETRIEVE RELATED TOOLS

Search

ACTIONS

Refresh F5

Export Shift+F1

Opening TSAAREV.csv

You have chosen to open:

TSAAREV.csv
which is: Microsoft Excel Comma Separated Values File
from: https://xadm-upg.test.uncc.edu

What should Firefox do with this file?

Open with Microsoft Excel (default)

Save File

Do this automatically for files like this from now on.

OK Cancel

Where do I see information and error messages?

OLD

NEW

At the very bottom of the Form

Information, warning and error messages will appear below the RELATED/TOOLS icons; if you click on the message or the message number (yellow block) it disappears

NEW

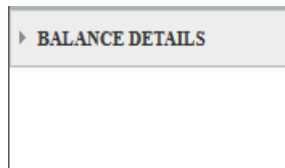
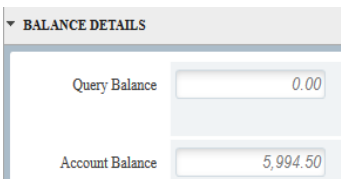
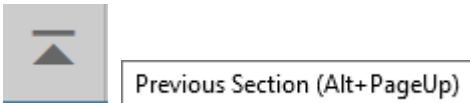
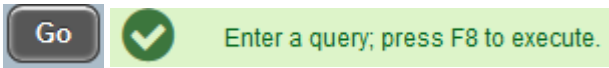
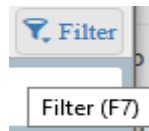
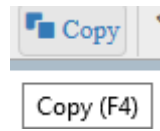
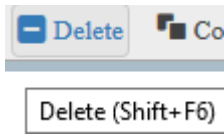
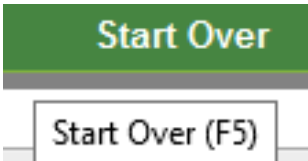
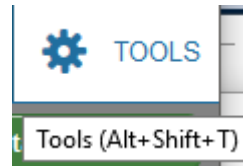
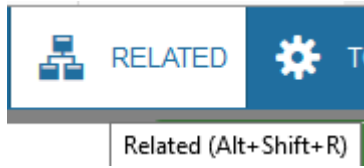
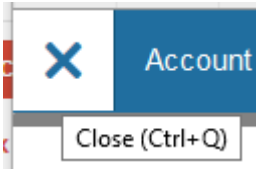
To improve security, inactive Banner Page sessions will time-out after 30 minutes; time-out can be avoided by clicking the Extend button

Warning! Due to inactivity, your session will expire in 00:02:43.

To extend your session another 30 minute(s), please press the Extend button.

When Banner Pages are working to find and display the data, the Page may be grayed and a spinning circle shown

Commonly used key board short-cuts for Banner Pages (from what you see at the top of the page down to the bottom of the page)



To see (if the black triangle points down) or hide (if the black triangle points right) sections of a Page