TENNESSEE
STATE UNIVERSITY

BANNER TIPS AND TRICKS
Training Guide

Updated - October 2015

Introduction

Banner Tips and Tricks is designed to show you many of the useful features available in Banner (also known as Banner INB). This guide is broken down into three (3) sections: Personalizing Banner, Searching in Banner and QuickFlows.

Personalizing Banner

Banner has some useful tools that allow you to personalize your Banner account. We will explore how to add items to My Banner, Create Personal Links and customize your colors in Banner.
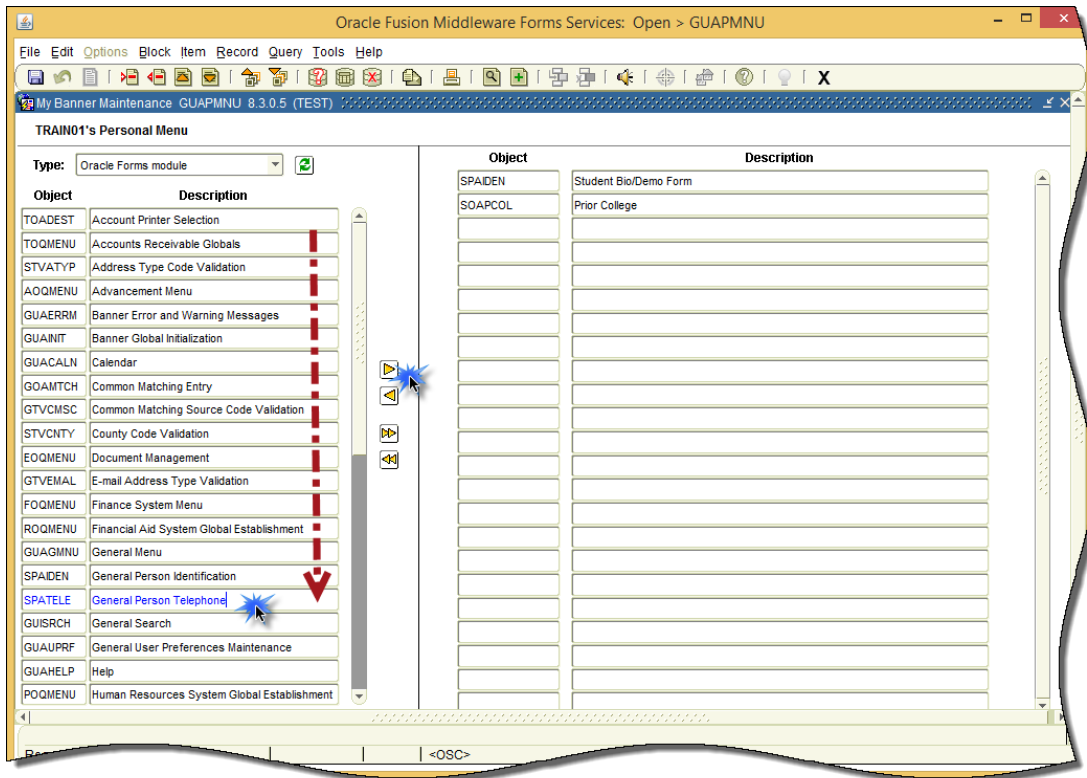
My Banner

My Banner is located in the Hierarchical Tree Menu Structure Canvas on the Main Menu. Think of My Banner as a favorites folder; a place where you can add the forms you use most often when working in the system.

Adding Items to My Banner
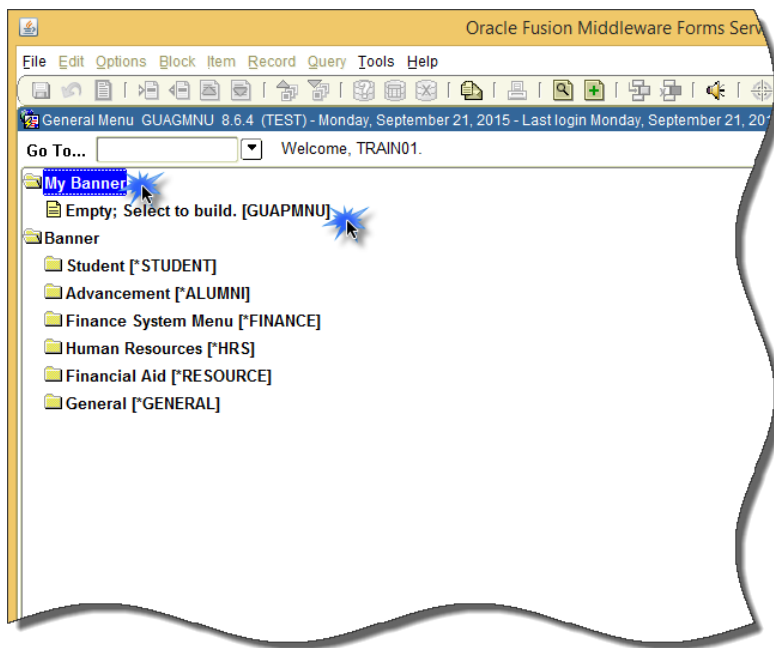
1. Open **My Banner**
2. Select **GUAPMNU**
   a. If you have not built your **My Banner**, it will say that it is empty

3. The My Banner Maintenance form will open – you have two options to add items to **My Banner**
   a. Scroll through the lift of forms (located in the table on the left)
   b. Highlight the form by double clicking on it (it will turn blue when selected)
   c. Click the **Insert Icon** ▷
   d. The form will be inserted into your list (located in the table on the right)
   e. When you are finished adding items, **Save** 💾 your changes
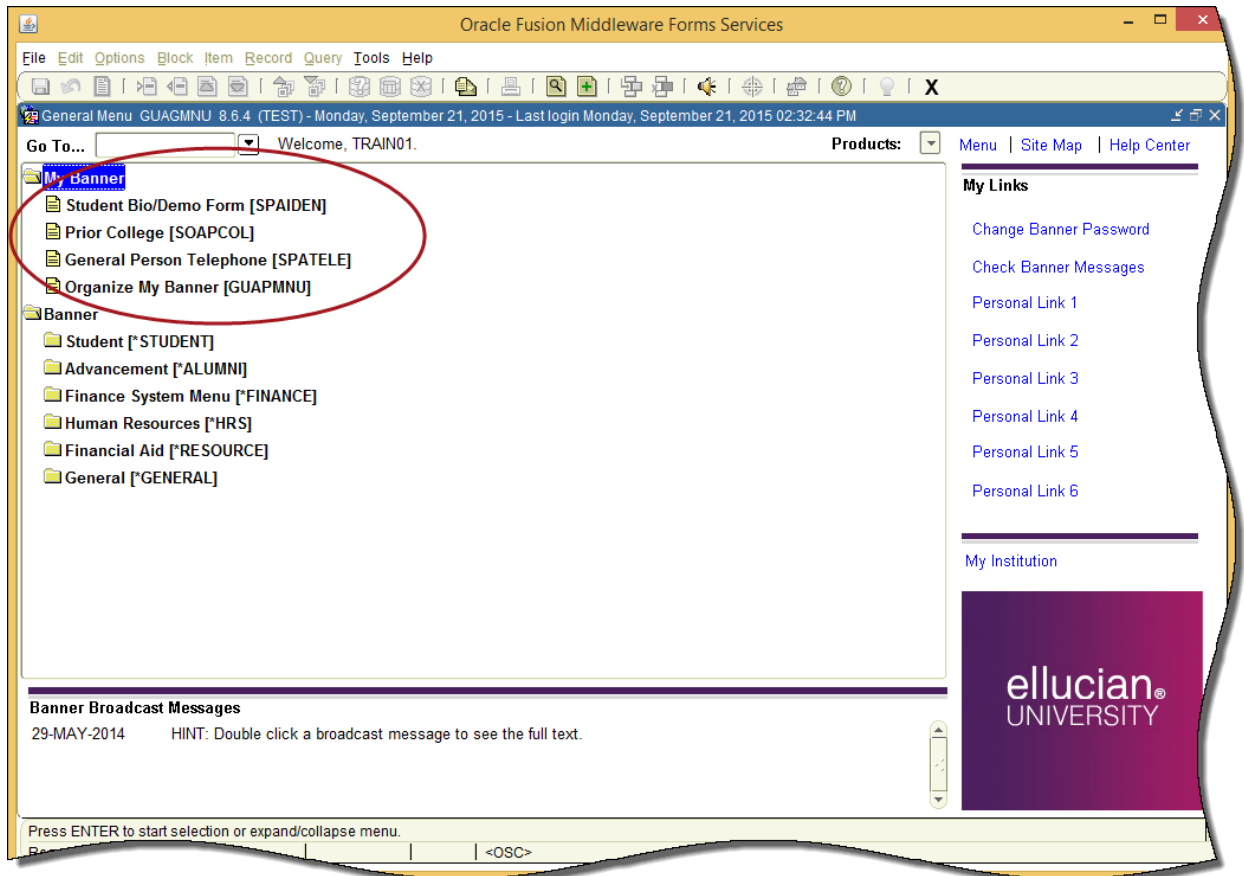
OR

   a. Enter the seven-character code directly into the Object Field in the table on the right
   b. Press the Tab Key
   c. The Form Description will display (you can edit the description)
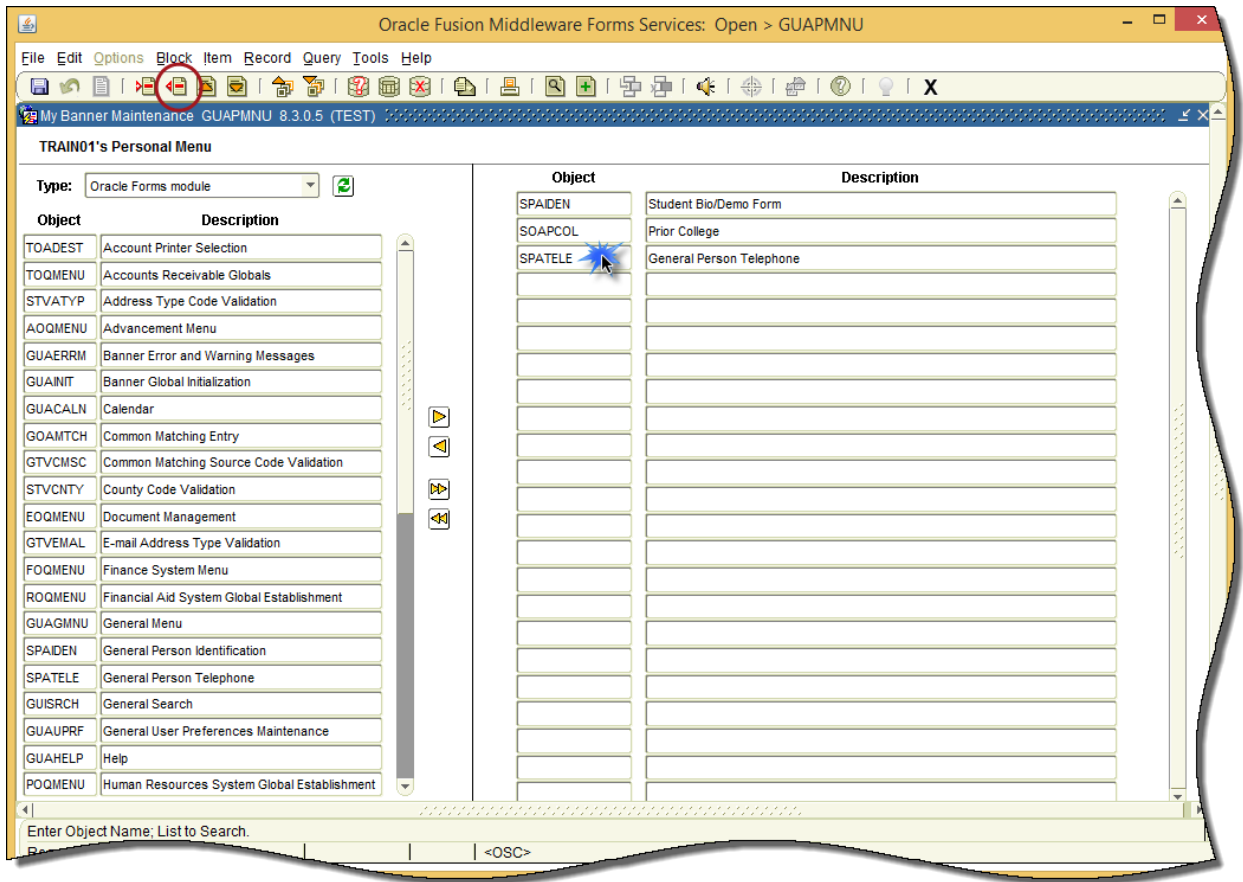   d. When you are finished adding items, **Save** 💾 your changes

Working with and Editing My Banner

In order to refresh **My Banner**, you will need to sign out of Banner and sign back in.

1. Click on the **My Banner** folder to expand it
2. Double click on the item you want to open
3. To edit **My Banner**, select the **Organize My Banner (GUAPMNU)** link

4. Click inside the field for the item in your list that you want to remove

5. Select **Record Remove**

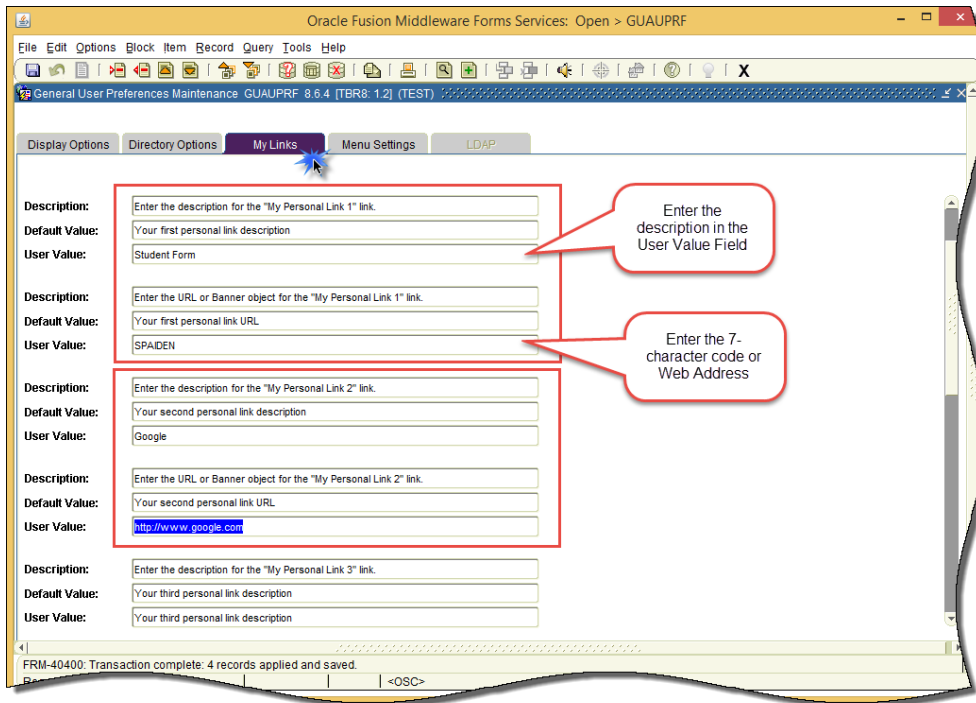6. When you are finished deleting items, **Save** 🖫 your changes
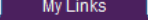
Personal Links

Similar to My Banner, Personal Links are available for you to set up, however, with Personal Links, you can include links to external Websites.
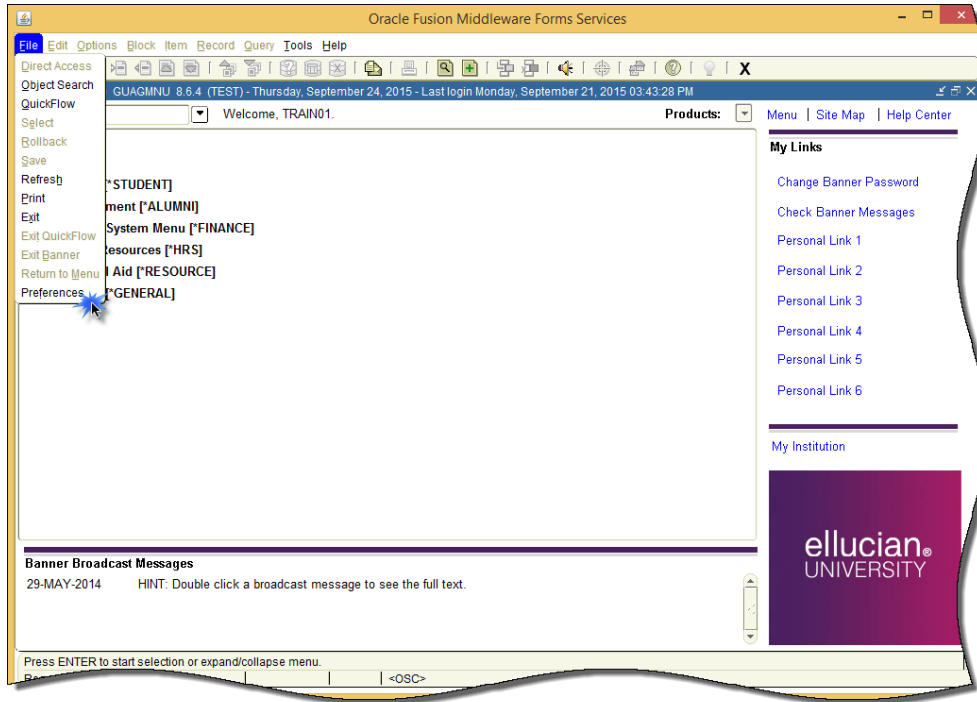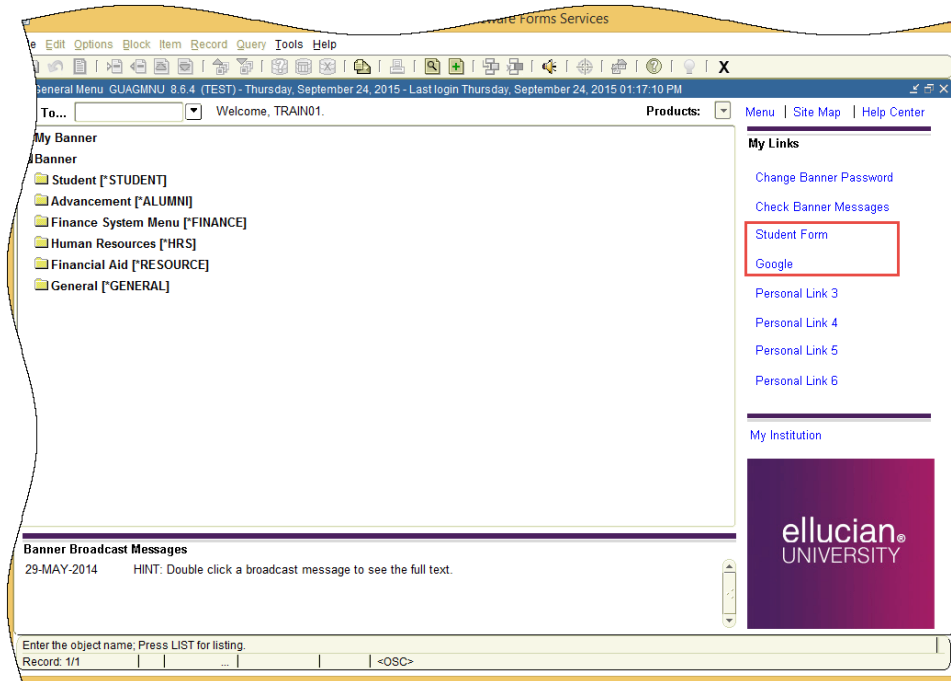

1.   Click the **File Menu**
2.   Click **Preferences**

3. Click the **My Links Tab** My Links
   a. Each Personal Link has two sections
4. Enter the description of the form or web address in the **User Value field**
5. Enter the 7-character code or web address in the **User Value field**

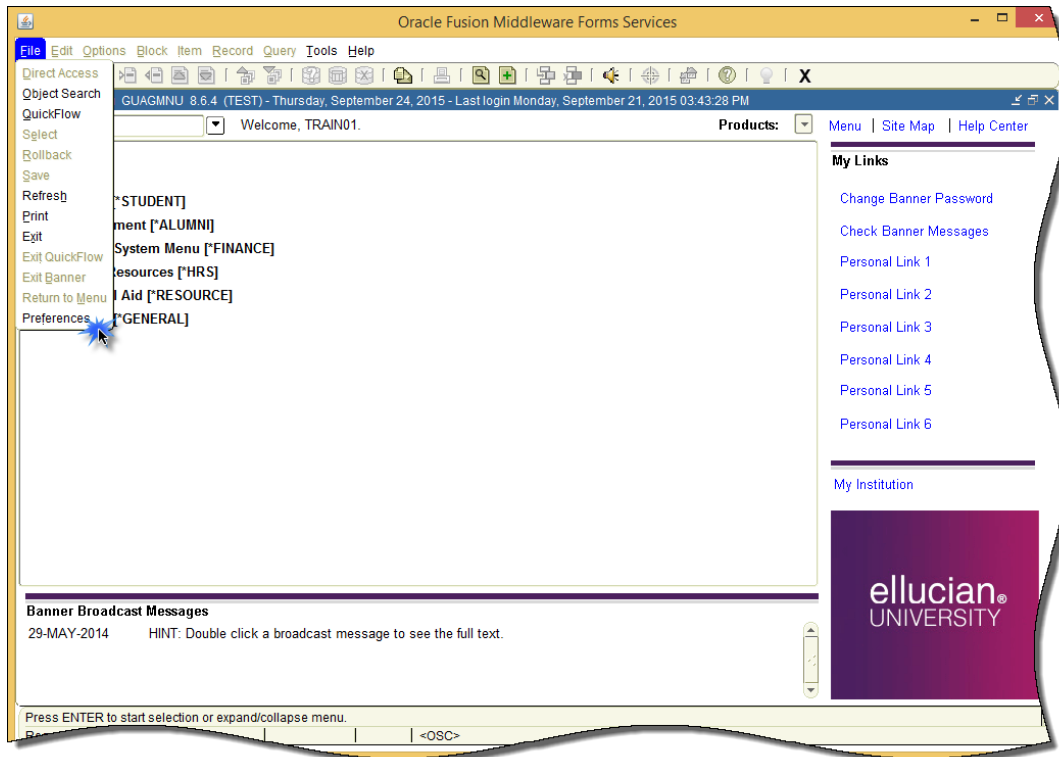6. When you are finished adding items, **Save** 💾 your changes

7. Next time you sign into Banner the descriptions will display
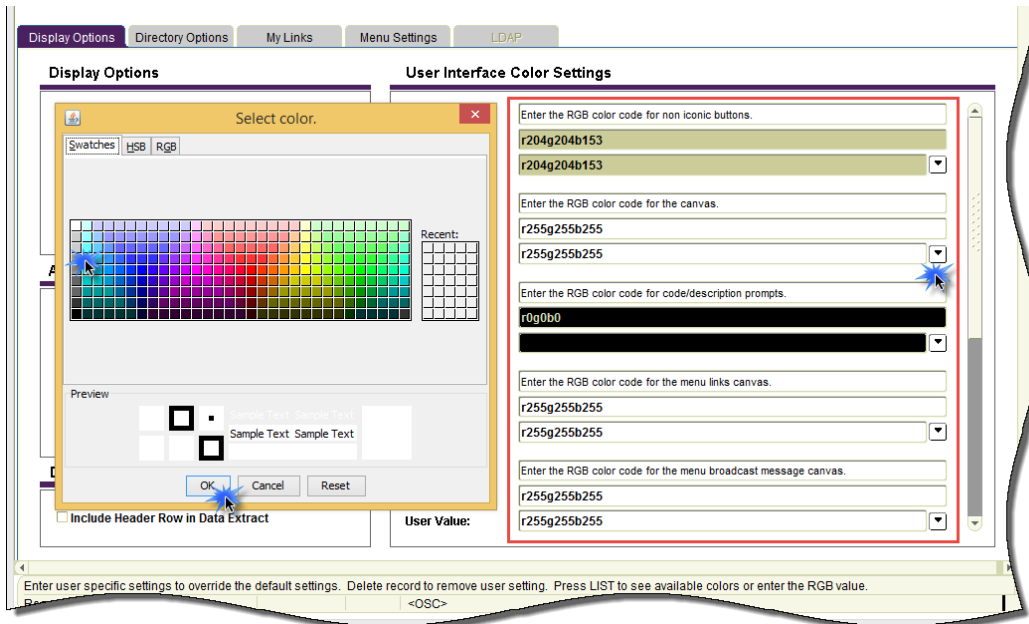
Colors

Adding Colors

Another way to personalize your Banner settings is to change the colors of the background, scroll bars and other interfaces.
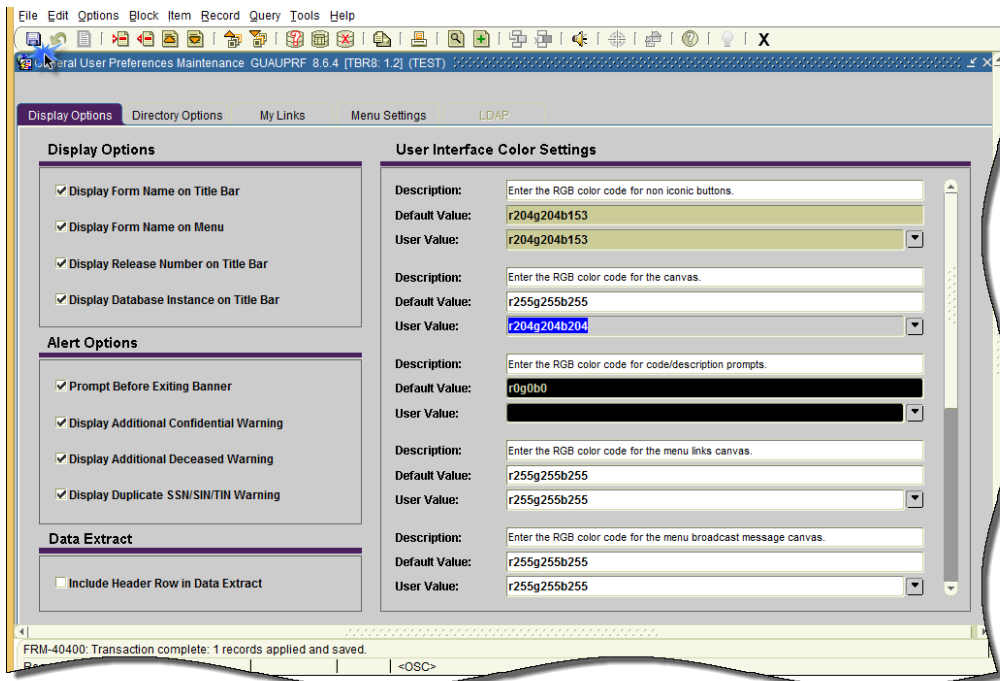

1. Click the **File Menu**
2. Click **Preferences**

3. Click the **Search Button** ▾ for the user interface you want to change
4. The **Swatches Window** will open
5. Click the color you want to select
6. Click **OK**
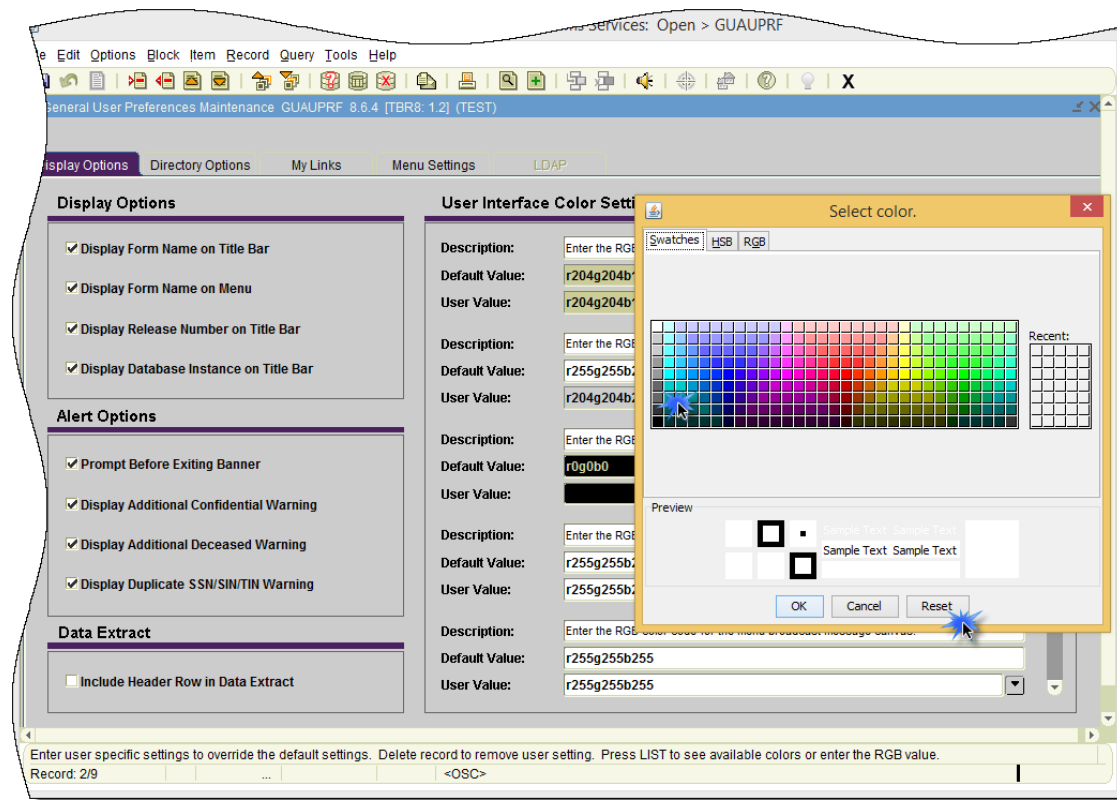7. Continue through the list as you like

8. When you are finished changing items, **Save** 💾 your changes
9. The colors will display

Changing/Resetting Colors

You have the ability to change any colors or reset colors that you have customized.

1. After selecting the **Preferences** option from the **File Menu** the window will open
2. Click the **Search Button** ▼ for the user interface you want to change
3. The **Swatches Window** will open
4. To reset the color (back to the default), click the **Reset Button**

OR

5. Select another color from the color swatch
6. Click **OK**
7. When you are finished changing items, **Save** 💾 your changes
8. The colors will reset or the new colors will display

Searching in Banner

This section will go over different types of searches in Banner.

General Search (GUISRCH)

The General Search form in Banner is a form you can use to find someone by their Email address or Phone Number.

1. Enter the E-mail address or Phone Number in the Key Block
2. Next Block
3. Matching results will display
4. Double-click in the ID Field for the record you want

5. Open the form you want to view
6. The T-Number will automatically populate
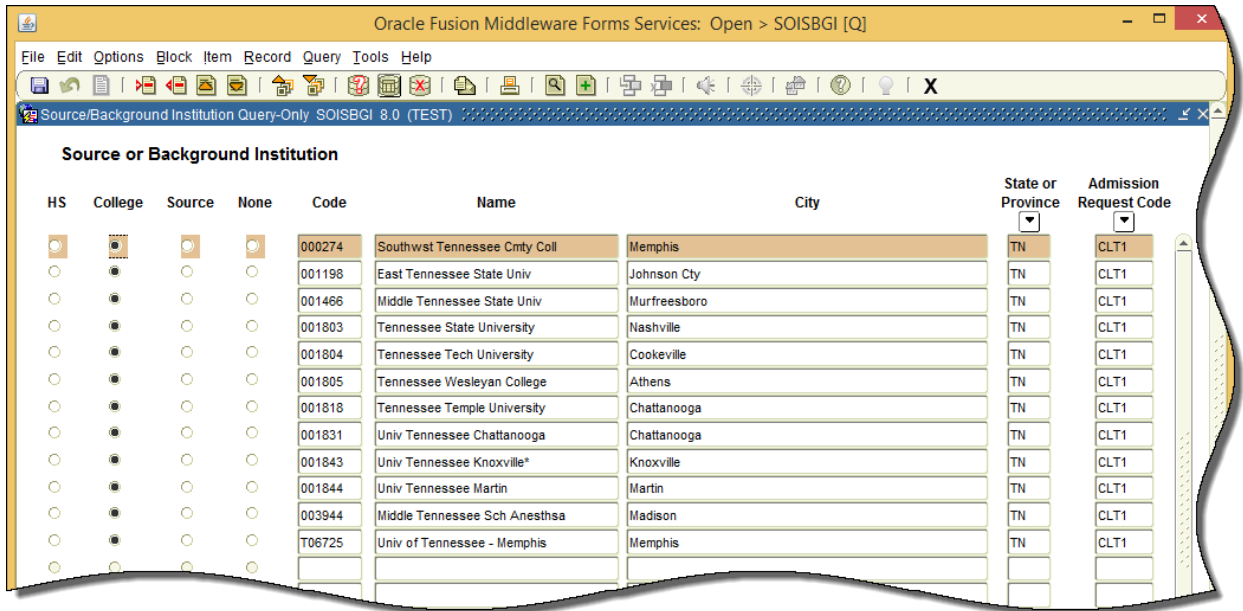
Reducing Your Search Results

You can reduce your search results in Banner using the wildcard (%).

1. Enter your search criteria
2. Execute your query (F8 or 🛢️)

3. Your results will display

Extracting Results into Excel
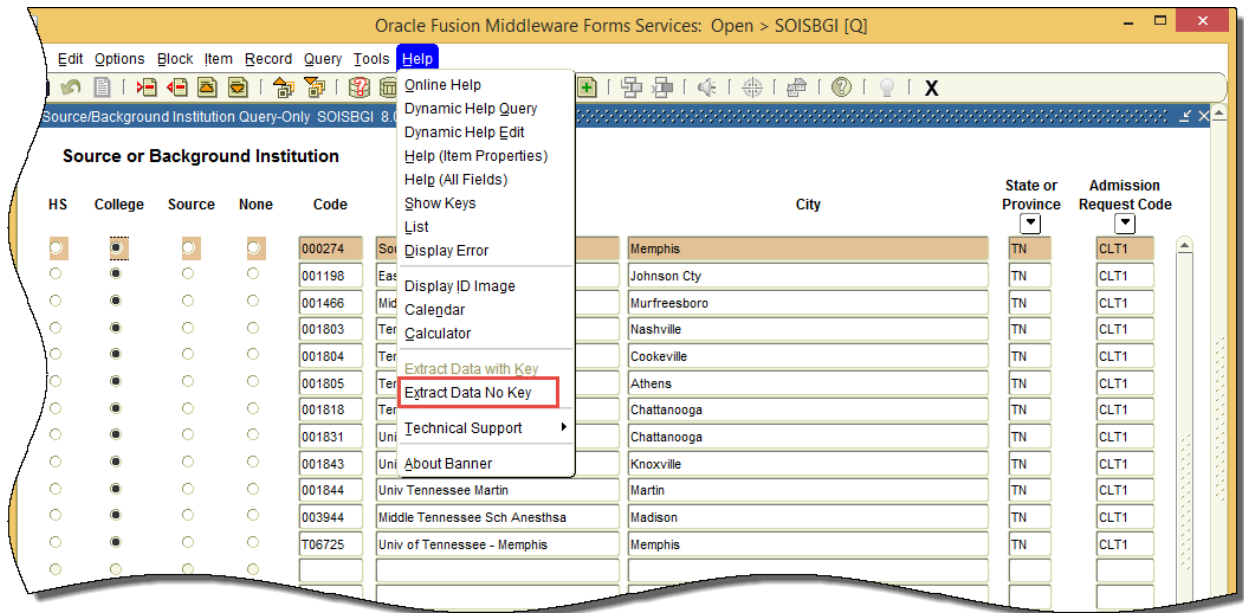
1. Select **Help->Extract Data No Key**
2. Follow the prompts (it may take a few minutes for your sheet to open)
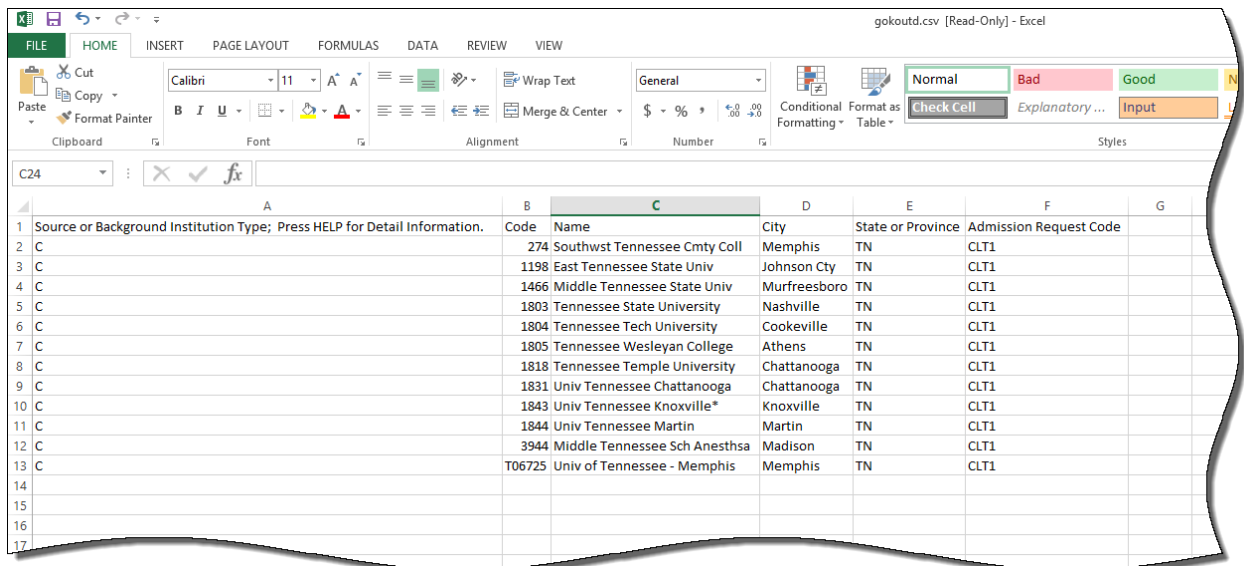
3. Your spreadsheet will open

QuickFlows

If there is a process that you do in Banner on a regular basis, you can set up a QuickFlow. A QuickFlow is a function in Banner that will take you to a series of pre-defined forms in the order that you design. QuickFlows are simple to create and even easier to use.

You can access the QuickFlow menu through the hierarchical tree structure menu (General-->System Functions/Administration-->QuickFlow Process) or by entering the form names into the **Go To field**

Go To... GTVQUIK
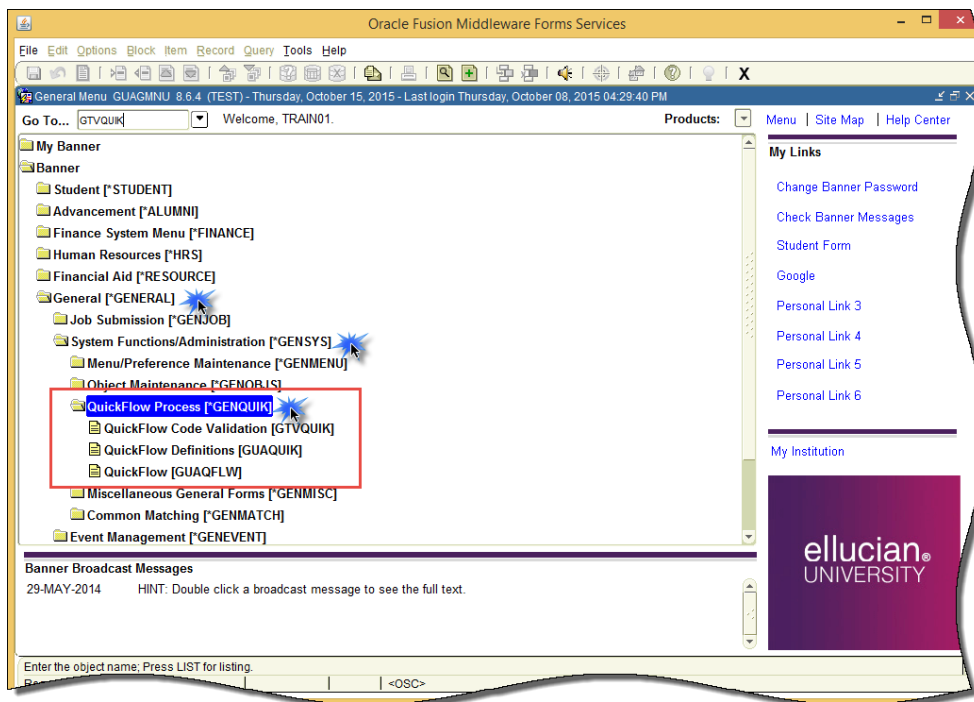
GTVQUIK - Add Your QuickFlow to the Validation Table

Your first step is to name and add your QuickFlow to the validation table.
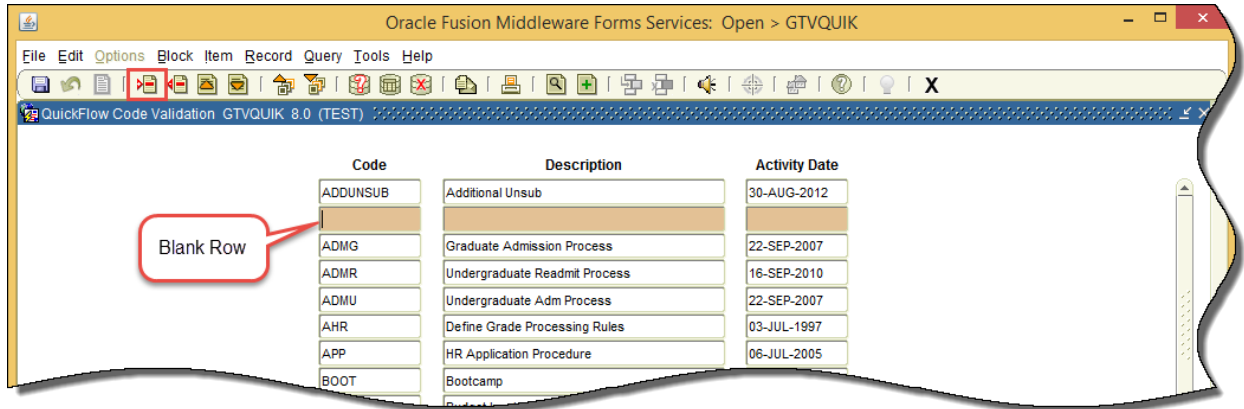
1. Open **GTVQUIK – QuickFlow Code Validation**
2. Click the **Insert Record icon**
   a. A blank row will be inserted
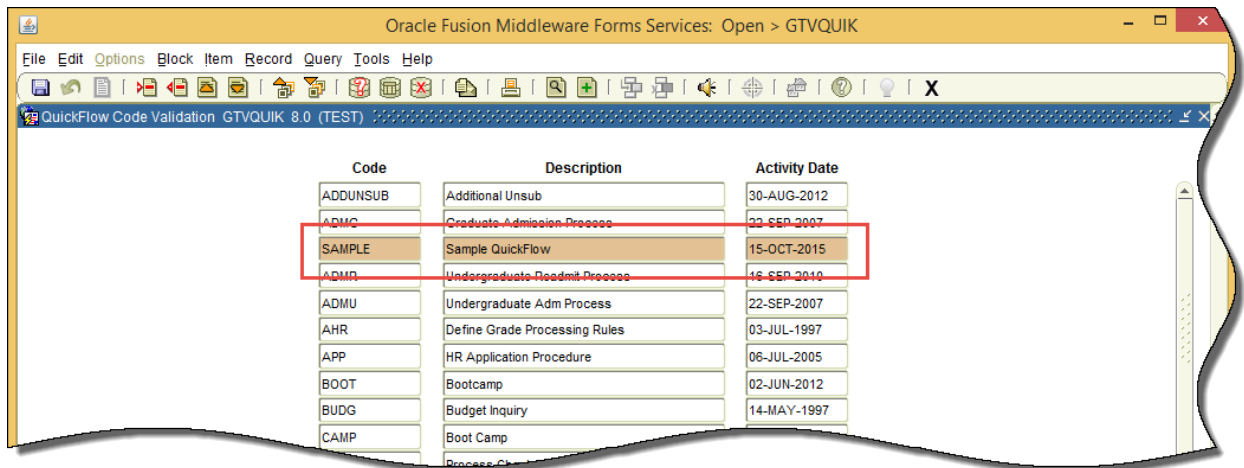
3. Enter the **Code**
4. Enter the **Description**
5. Save
6. Close the form **X**

GUAQUIK – Define/Create Your QuickFlow

Your next step is to define your QuickFlow, meaning adding the forms to your QuickFlow (in the order you want the forms to open).
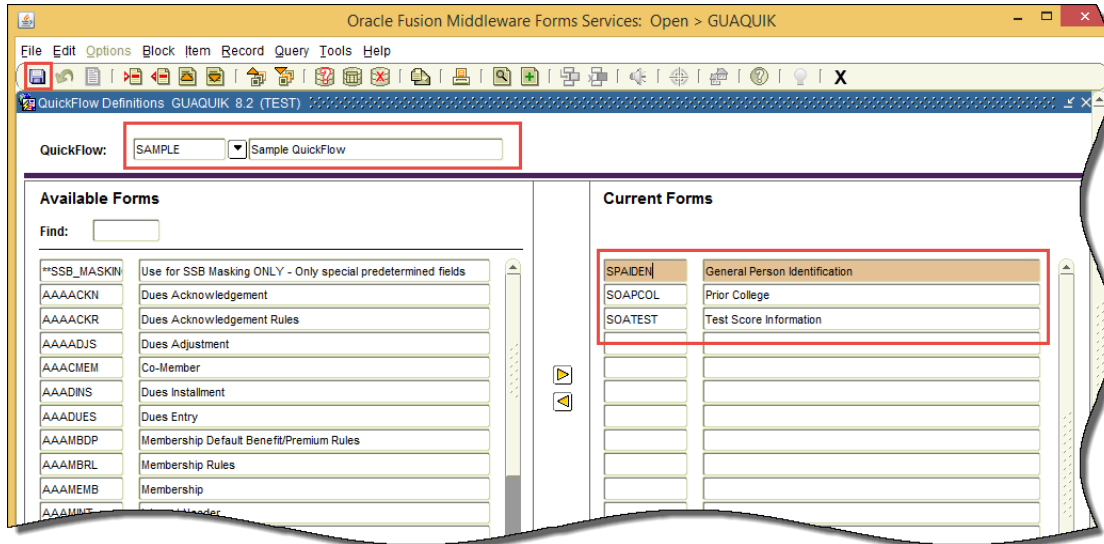
1. Open GUAQUIK
2. Enter your QuickFlow name in the Key Block
   a. If you do not know the name of your QuickFlow you can search for it by selecting the
      Search button [⏷]
   b. Select **QuickFlow Codes**
3. **Next Block**
4. Enter the forms that will be in your QuickFlow *in the order that you want the QuickFlow to run* in the **Current Forms block** located on the right side of the form
5. Save
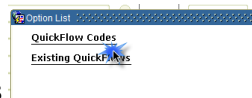
GUAQFLW – Launching Your QuickFlow

There are several ways to launch your QuickFlow.

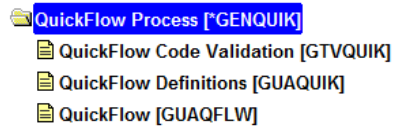|	
1. Click through the Hierarchical Tree Menu Structure Canvas and select **QuickFlow (GUAQFLW)***	QuickFlow Process [*GENQUIK] QuickFlow Code Validation [GTVQUIK] QuickFlow Definitions [GUAQUIK] QuickFlow [GUAQFLW]
2. Enter the QuickFlow name in the **Go To Field**	Go To... SAMPLE
3. Go to **File→QuickFlow***	File Edit Options Block Item Reco Direct Access Object Search QuickFlow Select Rollback Save Refresh Print Exit Exit QuickFlow Exit Banner Return to Menu Preferences
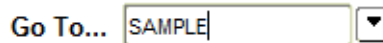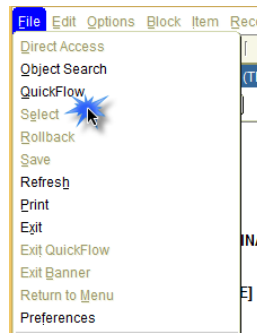
4. Add the QuickFlow to **My Banner**	General Menu GUAGMNU 8.6.4 (TEST) - Th
	Go To... Welc
	My Banner
	  Student Form [SPAIDEN]
	  Sample QuickFlow [SAMPLE]
	  Organize My Banner [GUAPMNU]
	Banner
	  Student [*STUDENT]
	  Advancement [*ALUMNI]
	  Finance System Menu [*FINANCE]
	  Human Resources [*HRS]
	  Financial Aid [*RESOURCE]
	  General [*GENER
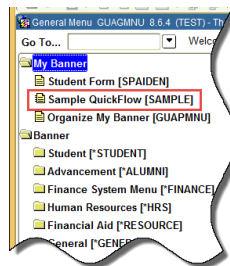
5. Add the QuickFlow to **Personal Links**	My Links Change Banner Password Check Banner Messages Student Form Google Sample QuickFlow Personal Link 4 Personal Link 5 Personal Link 6
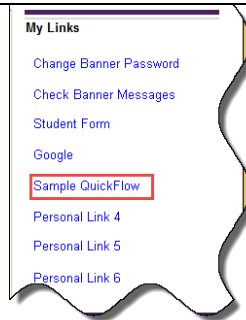
*If you select this method, you will have the ability to search and automatically relaunch for your QuickFlow. See Searching for an Existing QuickFlow below for instructions.
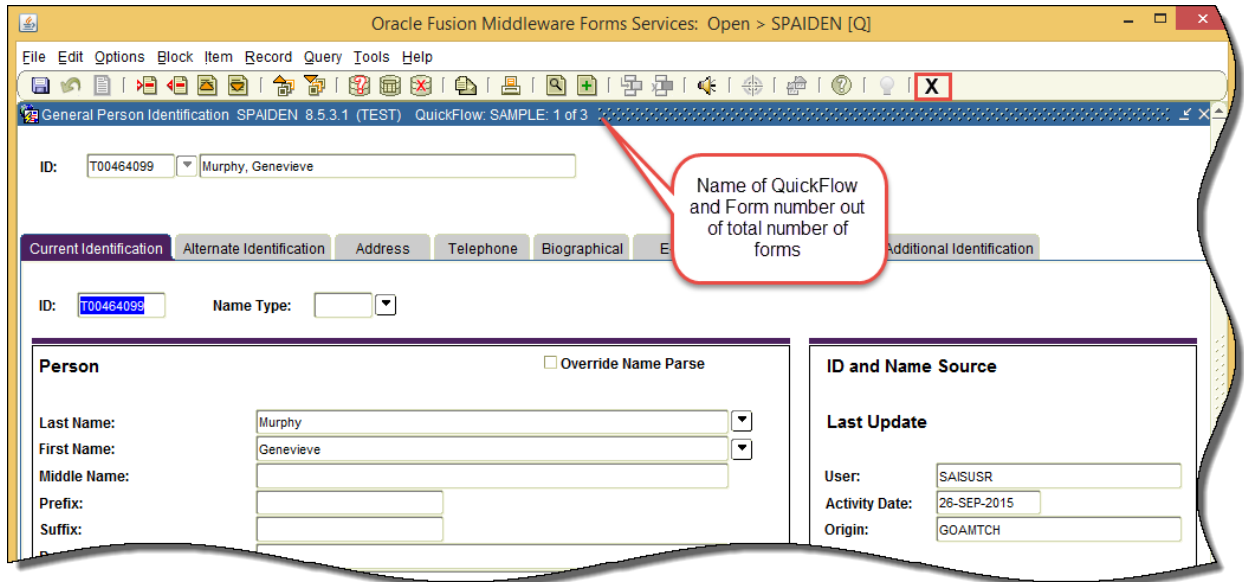
1. The first form in your QuickFlow will open
    a. Notice the name and form number out of total number of forms in QuickFlow in the Title Bar
2. Perform the task
    a. Be sure to save you work if you make any changes
3. **Close** **X** the form
4. The next form in your QuickFlow will open
5. Continue through the QuickFlow until you have gone through all the forms

GUAQFLW – QuickFlow Form (Searching for an Existing QuickFlow)

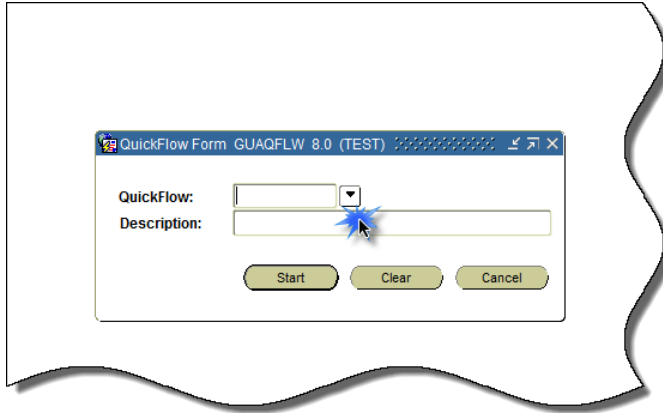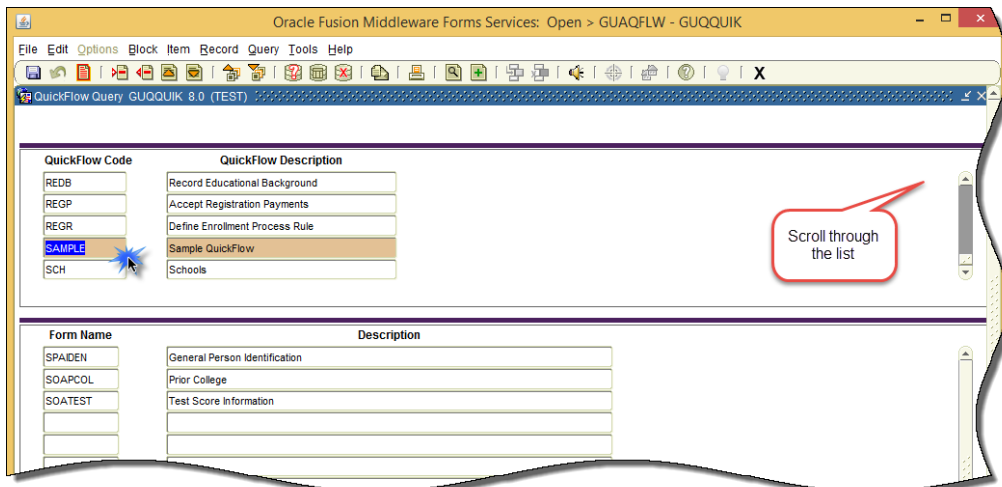The QuickFlow functionality allows you to search for a QuickFlow by going to File→QuickFlow or using the form GUAQFLW – QuickFlow. The benefit to opening a QuickFlow with these two options is that when you finish with your QuickFlow, you have to option to automatically relaunch it.
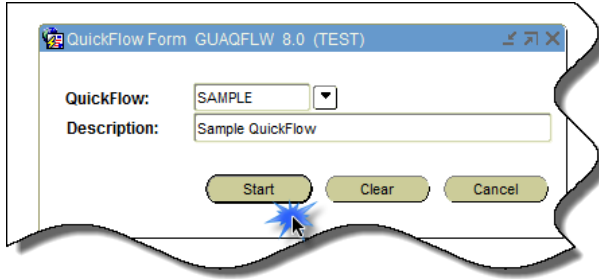

1. Open GUAQFLW – QuickFlow
2. Click the **Search Icon** ▼

3. GUQQUIK – QuickFlow Query Form will open
4. Scroll through the QuickFlow codes located on the top of the form
5. Double click on the QuickFlow you want to launch

6. The code will populate in the QuickFlow field
7. Click **Start**
8. Your QuickFlow will launch
    a. When you close out of the last form of your QuickFlow, GUAQFLW will open
        i. Click **Start** to launch the QuickFlow again
        ii. Click **Cancel** to exit the QuickFlow

Exit QuickFlow

If you need to exit your QuickFlow before you have gone through all the forms you can do that by going to **File→Exit QuickFlow**. *The QuickFlow will not remember the record or the form that you were in when you relaunch the process.*
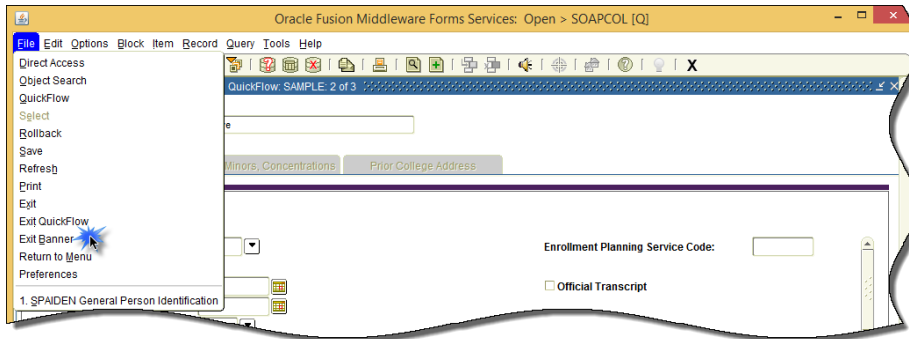
Tennessee State University is an AA/EEO employer.