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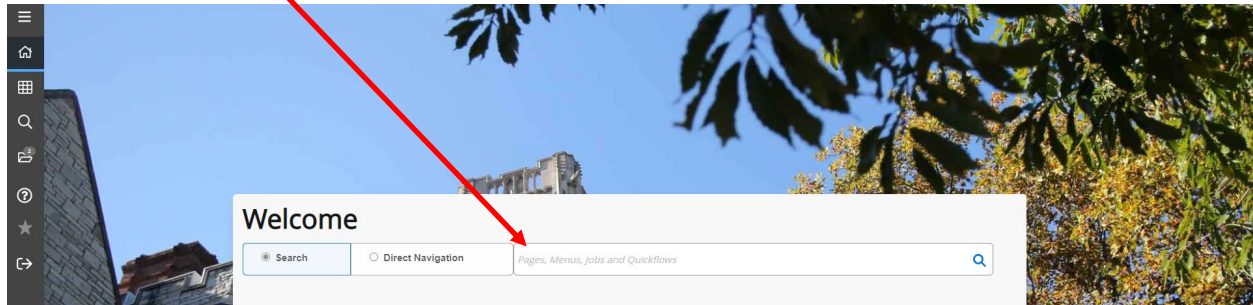
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WILD CARD

- When searching in Banner you can use a “%” aka a wild card. You can use it as much or as little as needed.
 - i.e. R%rd%n
 - i.e. Barb%
 - i.e. Rardin%

HOW TO ACCESS A FORM/PAGE

- In the white blank line, you can enter the 7-digit character name or a partial title of the form.

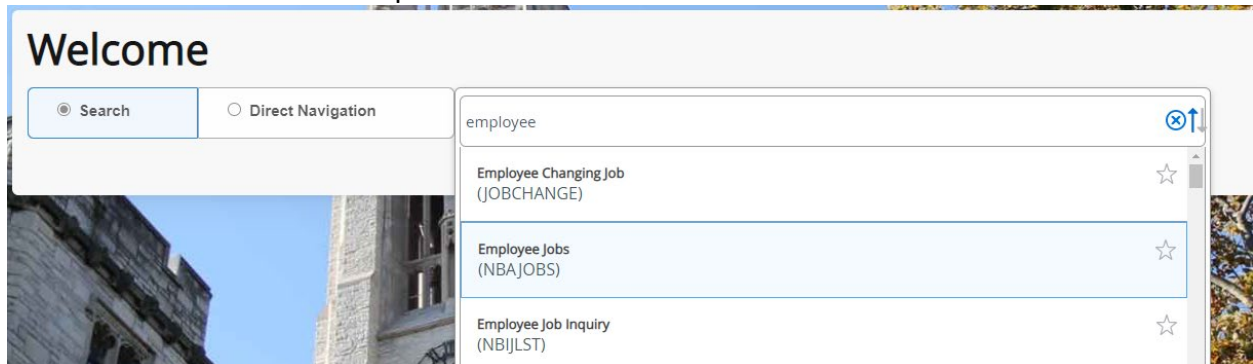


- Examples:
 - Entering the 7-digit character name. (a.k.a. Direct Navigation)
 - After you enter the name then hit enter.
 - The form will open.

Welcome

Search
 Direct Navigation



- Entering a partial title of the form. (a.k.a. Search)
- Scroll down/or arrow to find the form and left click on the form
- The form will open.



FORM/PAGE EXAMPLE

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

WHAT DO I DO NEXT?

- You can enter the value in the field 
- OR
- Search for someone or something:
 - At the top of the form or within the form you will see the following:
 - Click on the 3 dots  or hit F9
 - It will bring you to an “Option List”
 - Or a “list of values”

Option List

[Person Search \(SOAIDEN\)](#)

[Non-Person Search \(SOACOMP\)](#)

[Alternate ID Search \(GUIALTI\)](#)

State/Province Code Validation (STVSTAT)

Criteria

Code	Description	ISO Code	EDI Equiv	Activity Date
AA	Military - Americas			12/08/15
AB	Alberta	CA-AB		07/25/15
ACT	Australian Capitol Territory			07/26/15
AE	Military - Europe			12/08/15
AK	Alaska	US-AK		10/09/15
AL	Alabama	US-AL		08/18/15
AP	Military - Pacific			12/08/15
AR	Arkansas	US-AR		08/18/15
AS	American Samoa			08/18/15
AT	Address	US-AT		08/18/15

1 of 5 | 20 Per Page | Record 1 of 83

Cancel OK

HOW TO SEARCH

- “Option List”
 - Select the right value from the list
 - The “Search” page will appear
 - Enter the values
 - Last Name and/or First Name
 - You can use a wild card which is a “%”
 - After you enter the values click “Go” or hit F8
 - Double click on the ID
 - OR
 - Click “Select” in the lower right corner

NOTE: When you Double click or click on “Select” the ID will be populated in the form you started in.


ID: R00167800 Barbara Louise Rardin

Get Started: Complete the fields above and click Go. To search by name, press TAB from an

- “list of values”
 - In the “Criteria” field
 - Enter the values
 - Enter as much or as little as possible
 - When the value comes up arrow down to select the value
 - Click “OK”

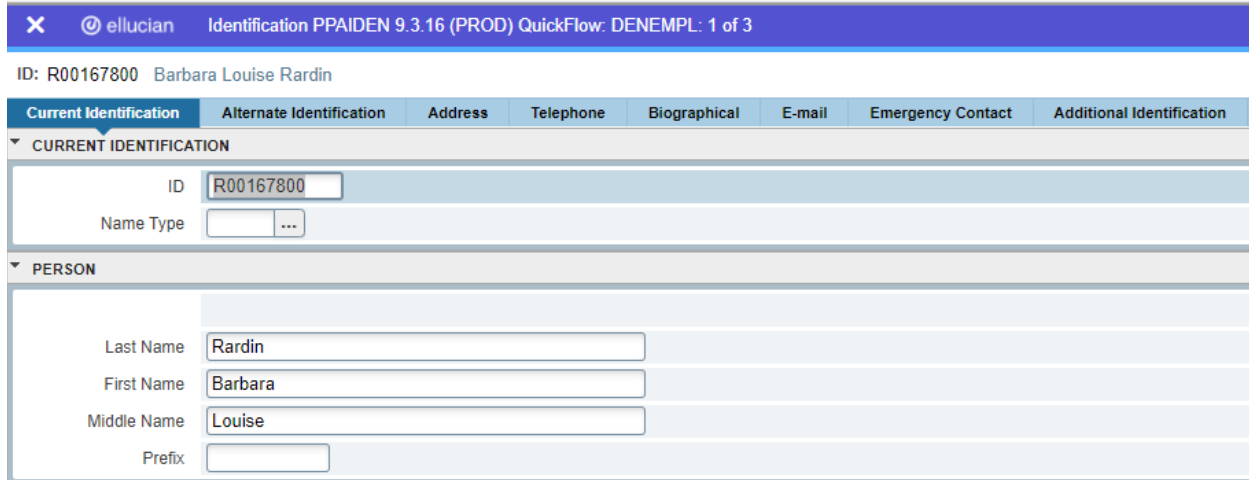
Code	Description	ISO Code	EDI Equiv	Activity Date
AA	Military - Americas			12/08/1995
AE	Military - Europe			12/08/1995
AP	Military - Pacific			12/08/1995
MI	Michigan	US-MI		08/18/1987
MN	Minnesota	US-MN		08/18/1987
MO	Missouri	US-MO		08/18/1987
MS	Mississippi	US-MS		08/18/1987
WY	Wyoming	US-WY		08/18/1987

GO

- After the values are entered
- Left-Click 
- The data in the form will appear

NAVIGATING IN THE FORM/PAGE

- Tabs
 - In this form it has tabs at the top of the form.
 - Left click on each tab to view and/or update data.



Identification PPAIDEN 9.3.16 (PROD) QuickFlow: DENEMPL: 1 of 3

ID: R00167800 Barbara Louise Rardin

Current Identification Alternate Identification Address Telephone Biographical E-mail Emergency Contact Additional Identification

▼ CURRENT IDENTIFICATION

ID

Name Type

▼ PERSON

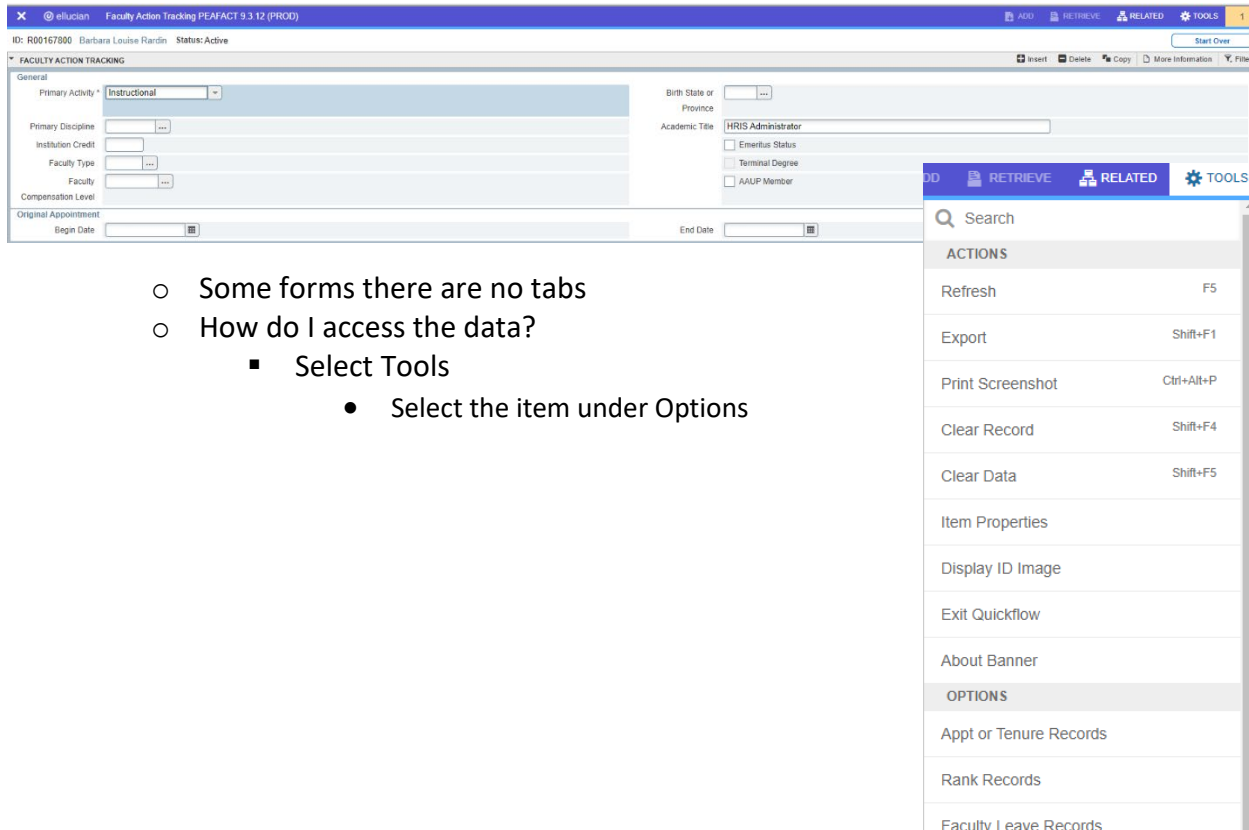
Last Name

First Name

Middle Name

Prefix

- No tabs



Faculty Action Tracking PEAFAC 9.3.12 (PROD)

ID: R00167800 Barbara Louise Rardin Status: Active

▼ FACULTY ACTION TRACKING

General

Primary Activity

Primary Discipline

Institution Credit

Faculty Type

Faculty

Compensation Level

Original Appointment

Begin Date

End Date

Birth State or Province

Academic Title

Emeritus Status

Terminal Degree

AAUP Member

ADD RETRIEVE RELATED TOOLS

Search

ACTIONS

Refresh F5

Export Shift+F1

Print Screenshot Ctrl+Alt+P

Clear Record Shift+F4

Clear Data Shift+F5

Item Properties

Display ID Image

Exit Quickflow

About Banner

OPTIONS

Appt or Tenure Records


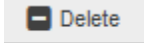

Rank Records

Faculty Leave Records

- Some forms there are no tabs
- How do I access the data?
 - Select Tools
 - Select the item under Options

INSERT/DELETING AND SAVING DATA IN THE FORM

Approval Category Code *	Description *	Self-Service Description	Self Service Display Sequence
ADECBD	New/Additional Ext Comp-Budget	Budget-New/Additional Extra Compensation	103
ADECGR	New/Additional Ext Comp-Grant	Grant-New/Additional Extra Compensation	53
ADEXC	StaffFac-New/Addtl Ext Comp	Staff-Salaried/9M Faculty New/Additional Extra Comp	33
ADGRD	GA Additional/New Position	GA-Additional/New Position	3
ADGRGR	GA Additional/New Posn Grants	GA Grants-Additional/New Posn	13
ADJOBS	Student Additional Position	Student-Additional Position	24
BUDCTL	Budget Control Notices		
CERSGR	Certification/PEN/PAIR- Grants	Staff Grants-Certification/PEN/PAIR Rate Change	
CERSGF	Certification/PEN/PAIR Staff	Staff-Certification/PEN/PAIR Rate Change	
CHGSP	Staff Change in Supervisor	Staff-Change in Supervisor	41

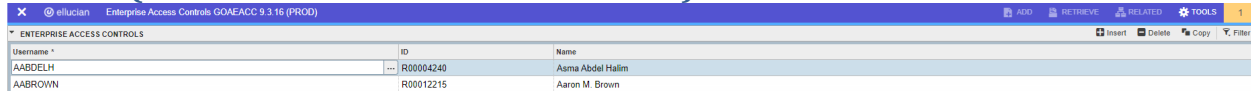
- Adding data to a form
 - Press F6 on your keyboard (or left click the  button in the upper right corner)
 - This will give you a new blank line to work with
- Deleting data to a form
 - Press “Shift + F6 on your keyboard (or left click the  button in the upper right corner)
- Saving data to a form
 - Press F10 on your keyboard (or left click the  button in the bottom right corner)

HOW DO I ACCESS DATA IN THE 2ND AREA IN THE FORM?

- Cursor is in the 1st area (DEANBM)
- Left click in the block below (i.e. DCorkin) or press “Alt” key and “PgDn” key on your keyboard

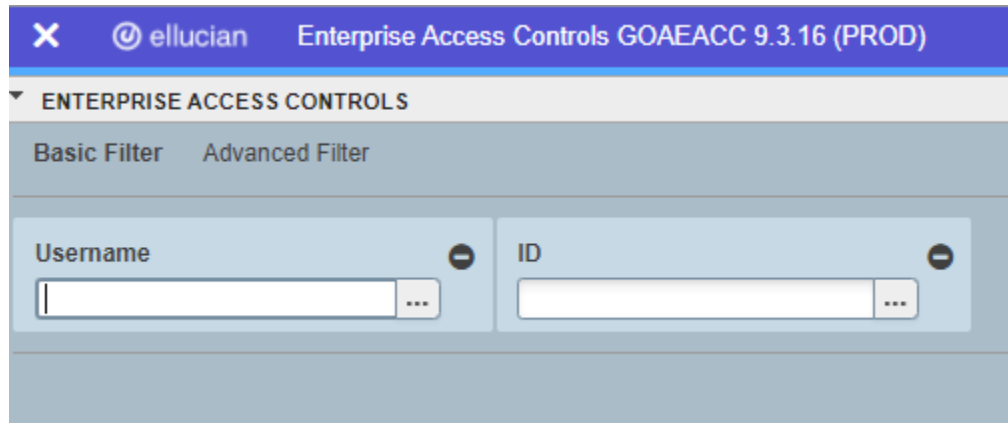
Electronic Approval		Other Modules
User ID: ALOPEZ Ann M. Lopez		
▼ DEFAULT LEVEL DESCRIPTION		
Level Code	Description	
APPRV1	Staff Approver 1	
DEPT	Dept Chair	
MGMT	Management	
EXEC	Executive	
DEANBM	Business Mgr/Dean/Designee	
1 of 1 Per Page		
▼ PROXY		
Proxy ID *	Name	
DCORKIN	Deborah L. Corkins	
DHAMMEL	Daniel J Hammel	
1 of 1 Per Page		

FILTER (PERFORMING A SEARCH ON DATA)



Username *	ID	Name
AABDELH	R00004240	Asma Abdel Halim
AABROWN	R00012215	Aaron M. Brown

- Select “Filter” or click “F7”
- Enter data
- Click on “Go” or click “F8—Execute the query”



Enterprise Access Controls GOEACC 9.3.16 (PROD)

ENTERPRISE ACCESS CONTROLS

Basic Filter Advanced Filter

Username

ID

REVIEW OUTPUT

Process Submission Controls GJAPCTL 9.3.21 (PROD)

Process: NBPPEMMA FA Mass Annu Process Parameter Set

- After you submit and save your report thru GJAPCTL
- You will receive a notification with the log and list file number

ADD RETRIEVE RELATED TOOLS 2

✓ Saving current parameter values as user level defaults.

✓ Log file: nbpspe_x_10856903.log List file: nbpspe_x_10856903.lis

- Click on “Related”
- Click on Review Output (GJIREVO)
- Find the output
 - Click the “3 dots” to the right of the “File Name”

Process: NBPSPEX Salary Planner Extract Process Number: 10856903

File Name: Beginning Date: Saved

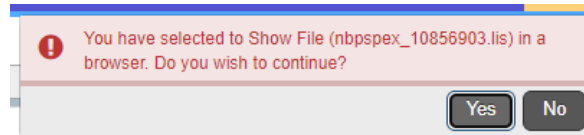
Lines:

Output File Name	Record Count	Date Saved
nbpspe_x_10856903.lis	160	02/23/2022 10:57
nbpspe_x_10856903.log	14	02/23/2022 10:57

- Click on the file you want to review

SAVE/PRINT OUTPUT

- Do you want to save/print and review the file or print it?
 - Click “Tools”
 - Click “Show Document (Save and Print File)” and/or click “Export”
 - Click “Yes”
 - The output will open in a new browser window
 - You can save, print, or review the output



https://selfservicedevl.utoledo.edu x Position Filters x +

selfservicedevl.utoledo.edu/devl/gokoutp.P_ShowReq?pipe_name=202202231109370559E3CC0001&sess_id=260659508&user_nam

Apps UT Banner Banner Workflow PageUp EPAF LaunchIT Radio Pers Acad ATS EllucOBUG

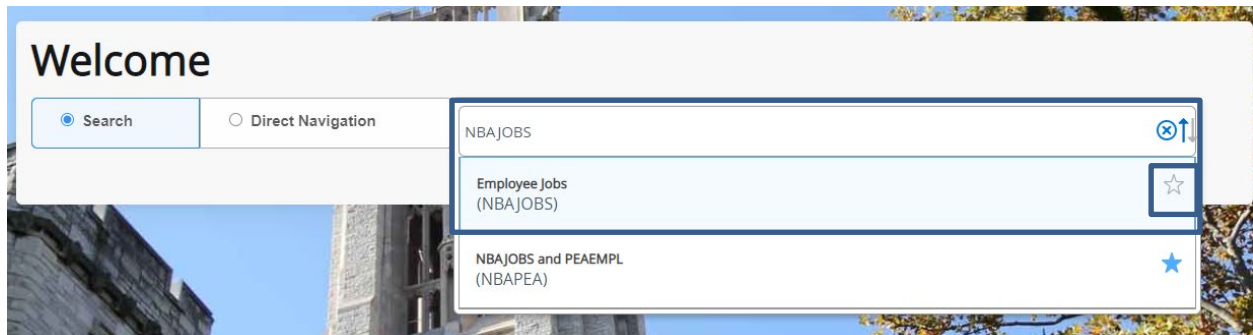
NBPSPEX (Release 8.19) University of Toledo Salary Planner Extract Process PAGE 1
RUN DATE 23-FEB-2022
RUN TIME 10:56 AM

COA T	Fiscal Year 2022	Budget ID FY22	Phase FY22	Budget Status A	Include Secondary Jobs N	Include Overload Jobs N	Include Positions No Bargaining Units Y	Include Positions No Budget Profiles Y
Employee Class		Budget Factor		Job Effective Date		Personnel Date		
A1		100.00		01-JUL-2021		01-JUL-2021		
A2		100.00		01-JUL-2021		01-JUL-2021		
A3		100.00		01-JUL-2021		01-JUL-2021		
A4		100.00		01-JUL-2021		01-JUL-2021		
A5		100.00		01-JUL-2021		01-JUL-2021		

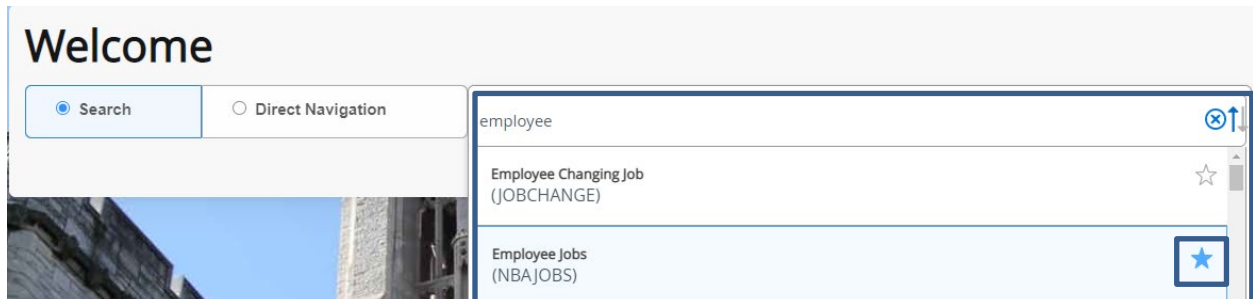
HOW TO SET-UP FAVORITES

- Enter the form name (i.e. NBAJOBS) or a name in the heading (i.e. Employee)
- When the name comes up, to the right you will see a “Star”
 - Click on the “Star”
 - This form will be saved in your “Favorite”

Before

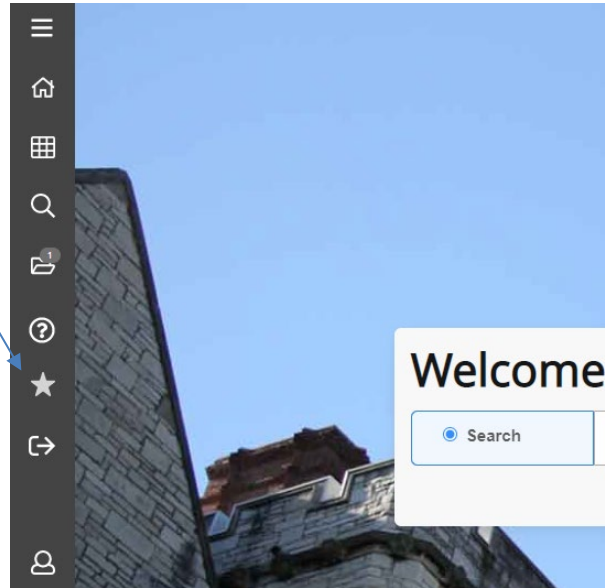


After



HOW TO ACCESS MY "FAVORITES"

- From the menu on the left
- Click on the "Star"
- NOTE: Your "Favorites" are saved here. Refer to "How to set-up your favorites".



This menu will appear when you click on the "Star"



SETTING UP “MY BANNER”

- Enter “GUAPMNU”
- Select the name from the “Type” drop down menu
 - Options include:

Personal Menu: BRARDIN

▼ MENU MAINTENANCE

Type * QuickFlow object

Object *	Description *
PXA1099	1099-R
PTV1099	1099-R Distribution Code Validation
GUAABOT	About Banner
PTVRQST	Accommodation Request Status Validation
PTVACST	Accommodation Status Validation
FTVACCT	Account Code Validation
FTIACTH	Account Hierarchy Query
FTMACCI	Account Index Code Maintenance
FTVACCI	Account Index Code Validation
FTVATYP	Account Type Validation
FTVACTV	Activity Code Validation
FOQADDR	Address Information Query
PPIADDR	Address List Inquiry
SOADDRQ	Address Summary
STVATYP	Address Type Code Validation
PHAADJT	Adjustment Processing
NTRAPRX	Administrator Proxy Rules
PEIATOT	Aggregated Benefit/Deduction Totals
GUAUIPW	Alternate Logon Verification

Record 1 of 456

Buttons: Insert Selection, Remove Selection, Insert All, Remove All

- Menu object
 - Quick Flow Object
 - Menu Message object
 - Oracle Forms module
 - Job Submission object
 - Dynamically Linked Library
- After “Type” is selected, left click below on one of the Object names
 - Click on the object
 - Click “Insert Selection”
 - After the Object is selected it will appear on the right
 - The Object will then be in Blue on the left
 - NOTE: If the “Insert Selection” does not work it maybe because you do not have access to that Object

▼ MENU MAINTENANCE

Type * QuickFlow object

Object *	Description *
PTRCERT	Certification Code Rules
PPACERT	Certification Information
FTVCOAS	Chart of Accounts Validation
PHICHEK	Check Detail Inquiry
FTICHKS	Check Number Validation
FAICHKH	Check Payment History
PHARECN	Check Reconciliation
STVCITZ	Citizen Type Code Validation
STVCPN	Collaborative Code Validation

Object Selection

Object	Description
PTRCERT	Certification Code Rules
PPACERT	Certification Information

Buttons: Insert Selection

SHORT CUT KEYS

Key Stroke	Function
Alt + Page Down	Next Section
Alt + Page Up	Previous
CTRL + C	Copy
CTRL + E	Edit
CTRL + M	Menu
CTRL + P	Printer
CTRL + Q	Cancel page, Exit, Close current page, cancel search or query
CTRL + V	Past
CTRL + X	Cut
CTRL + Y	Open Items
CTRL + Z	Undo
CTRL + Shift + F	Sign out
CTRL + Shift + L	Help
CTRL + Shift + Y	Search
Esc	Cancel Action
F3	Duplicate Item
F4	Duplicate Selected record
F5	Refresh/Rollback
F6	Insert/Create Record
F7	Search/Open Filter Query
F8	Execute Filter Query
F9	List of Values
F10	Save
Shift + F1	Export
Shift + F4	Clear One Record
Shift + F5	Clear All in Section
Shift + F6	Delete Record