

Module 01: Banner Basics

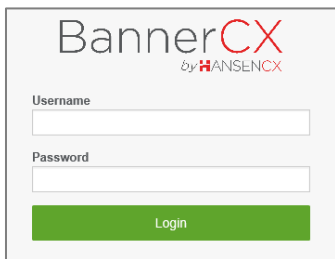
BannerCX Upgrade Training

Summary

This document provides an overview of the BannerCX navigation and search techniques.

Log In

1. Click  to open **BannerCX**.




The login window displays the BannerCX logo at the top. Below the logo, there are two input fields: 'Username' and 'Password'. At the bottom of the window is a green button labeled 'Login'.

2. At the login window, type your network **Username** and **Password**.
3. Click **Login**.

Log Out

Never leave your workstation unsecured.

To log out of BannerCX: at the top right of BannerCX, click .

Dashboard Components

The screenshot shows the BannerCX dashboard interface. A red box on the left highlights the **Menu Bar**. A red box at the top highlights the **Information Bar**, which includes tabs for LOCATOR, CALENDAR, USAGE, FINANCIALS, and COLLECTIONS. Below the tabs is the **Informational Tabs** section, containing a search type dropdown, a search for input field, a Search button, a Clear button, and an Advanced Search link. The **Locator Area** is the section below the search, showing a table of recent accounts. The **List Panel** is the table itself, displaying 10 records with columns for Customer, Premises, Name, Address, City/ST/Zip, and Status.

Customer	Premises	Name	Address	City/ST/Zip	Status
1234	316818	HAWKS, JOHN C	10031 ORCHARD GRASS CT	CHARLOTTE NC 28278	A
627889	335126	ZAIONZ, BARBARA	309 S THOMPSON ST B	DAVIDSON NC 28036	A
400400	417005	CLT WATER SAMPLING STATION	17260 LANCASTER HIGHWAY	CHARLOTTE NC 28277	N
223638	293256	JONES, RALF D	14611 HIGHWAY 73	HUNTERVILLE NC 28078	A
630197	3798	AMERICAN TOWER CORP	900 FRANKLIN AV	CHARLOTTE NC 28206	A
159707	187957	BALLANTYNE DEVELOPMENT CORP	11639 NORTH COMMUNITY HOUSE RD	CHARLOTTE NC 28277	I
1081413	137234	WOODY, GENEVERA	1025 W 4TH ST B	CHARLOTTE NC 28202	A
876990	13165	GRIFFIN, ANLEASHYA R	819 E 19TH ST	CHARLOTTE NC 28205	A
385694		HOBGOOD, JAMES E			
1069950	377909	BERMEO, GABRIEL G	12224 DOWNY BIRCH RD	CHARLOTTE NC 28227	A

Information Bar

The screenshot shows the top of the BannerCX interface. The **Dashboard Link** is the BannerCX logo. The **Favorites** section contains icons for Service History Query, Consumption History Query, Bill History Query, Ledger Card History Query, and Move In/Out Service Order Generation. The **Quick Links** section contains icons for a bell, a plus sign, a question mark, a user profile, and a power button.

Dashboard Link








Click to return to the Dashboard from anywhere in the system. (For users with access to multiple Dashboards, you will return to the last Dashboard you selected. Use the Dashboard menu bar button to change Dashboard views.)

Favorites






Shortcuts to commonly used forms.

	Service History Query
	Consumption History Query
	Bill History Query
	Ledger Card History Query
	Move In/Out Service Order Generation

	Service Order Generation
	Complaint Maintenance
	Payment Arrangement Maintenance
	Adjustment Posting
	Consumption Adjustment

















Quick Links

View alerts, online help and access other navigational shortcuts.

	<p>An alert indicates that there are important conditions concerning the account that might need special treatment, such as a loan, a key account, life support, or a billing/service order exception.</p> <p>The number of alerts for the account you've selected displays on the icon in a red bubble.</p> <p>Click to view the alerts and a link to more information about the alert.</p>
	Click to add a new note.
	Click to view help topics.
	Click to view username and BannerCX version number; password and user preferences cannot be changed
	Click to log out of BannerCX.

Menu Bar

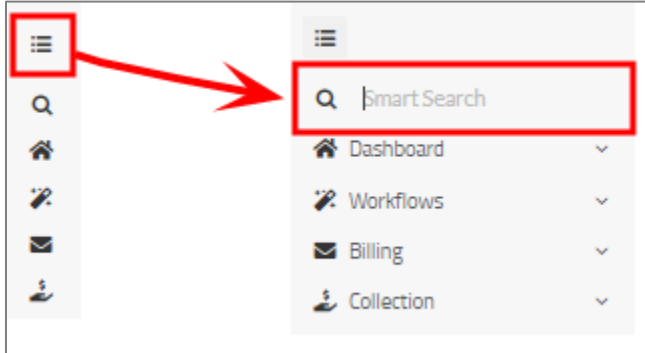
The Menu Bar displays on each screen and provides quick access to menus based on your user access. The menu items mirror Banner 4.3 and will be covered in more detail during your role-based training.

	Menu Bar toggle: Click to expand the Menu Bar to reveal menu names and submenus; you can also mouse over a collapsed icon to see the menu name and associated submenus
	Smart search: Expand the Menu Bar then type key terms to find system forms Smart Search lets you search by partial menu names too.
	Click to view different dashboards; access and training are based on your specific job role.
	Workflows (wizards)
	Billing
	Collection
	Deposit
	Service
	Service Order
	COC
	Prebill
	Accounts
	Financial
	Ancillary
	Utility
	Inventory

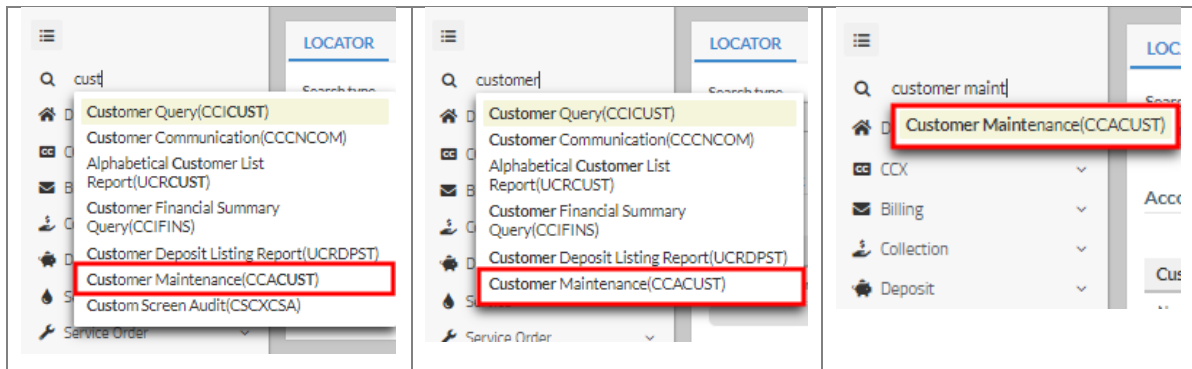
Search the Menu Bar

The Menu Bar remains collapsed, only displaying icons. You can mouse over each button on the bar to see the module name and navigate to any module. To search the Menu Bar, however, you must expand the Menu Bar.

1. Click the menu toggle button to expand the Menu Bar to reveal the Smart Search and menu names.



2. In the Smart Search field, enter all or part of the module you want to locate. For example, here are some different ways to locate Customer Maintenance by entering **cust**, **customer**, or **customer maint**.



The more general your search means you may need to select from a list of choices.

Informational Tabs

Use to access account information. The system defaults to the **Locator** view.

Locator

The system opens to the Locator area where you can perform a simple or advanced search. Allows you to search based on different criteria ("Search type") and enter a value (using wildcards).

After clicking **Search**, the results will display below in the List Panel. Click an item in the list to view the record.

Customer	Premises	Name	Address
192127	251129	FARMER, TERRANCE J	0000 HUNTER LN
743577	251129	BUNGALOW DESIGNS INC,	0000 HUNTER LN
154263	75450	CLEAVES, FREDRICK T	100 HUNTER LN

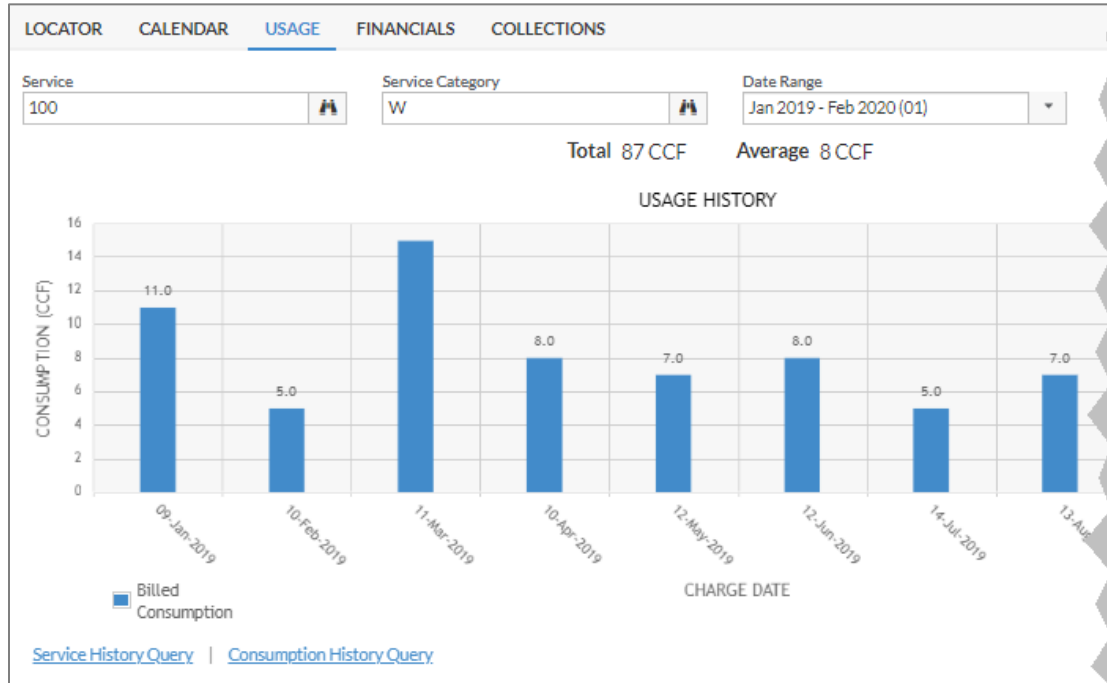
Calendar

Provides a calendar for the selected account where you can select the event types to view.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15

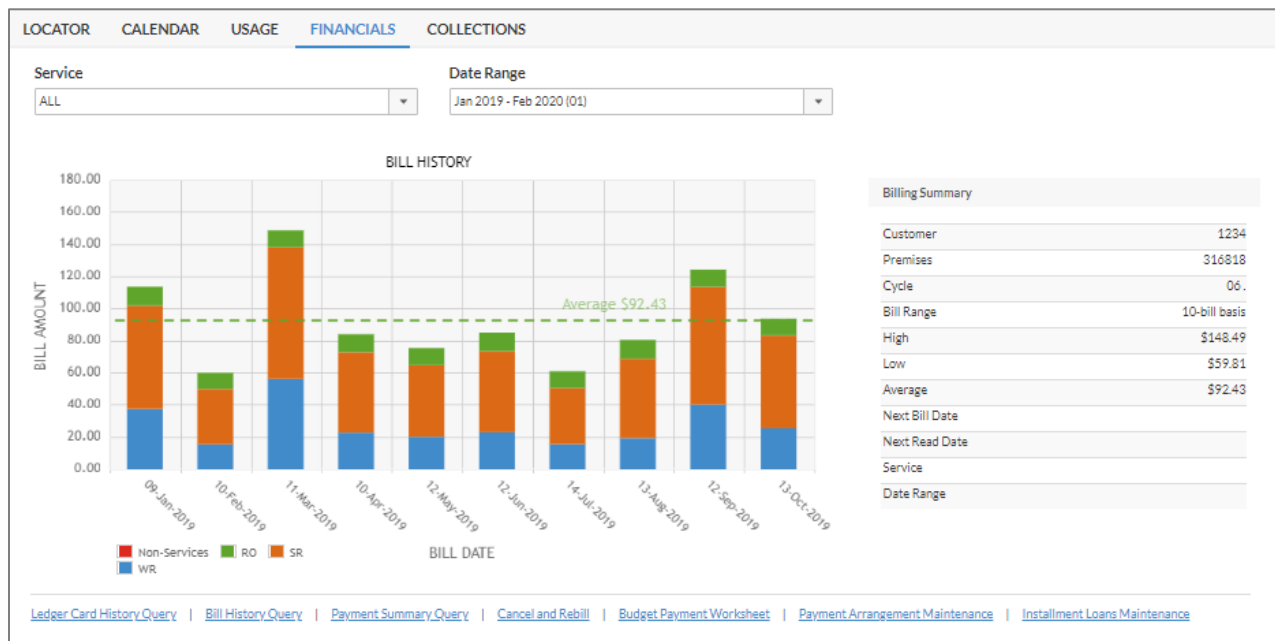
Usage

Displays usage by service and date, a charges and consumption graph, and details such as charge date and read type. You can also view the service history, consumption history, and storm water history.



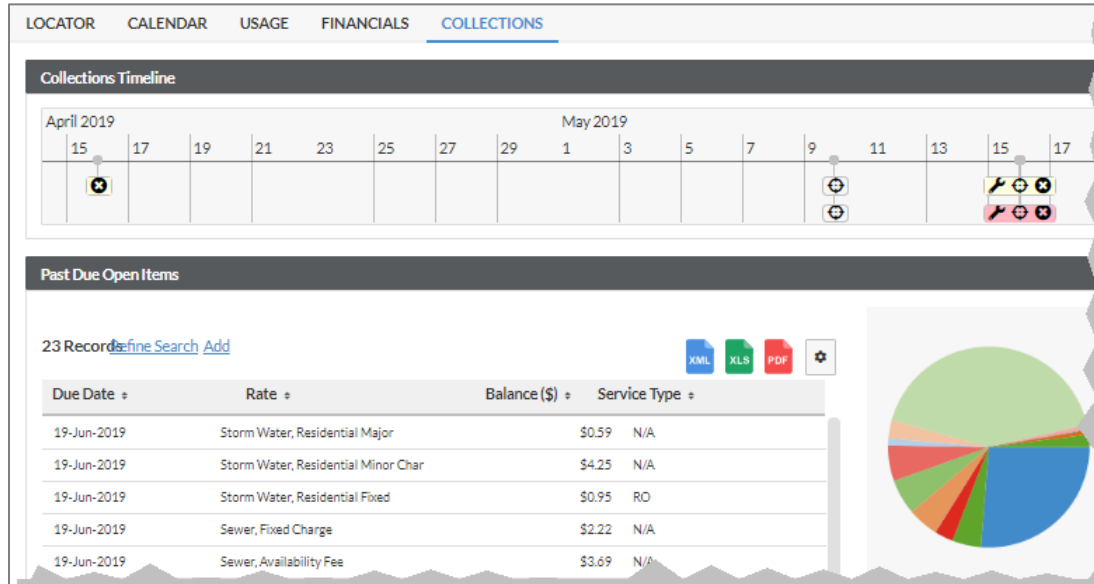
Financials

Displays a bill history graph, a billing summary, and the ledger records where you can search for a service and by a date range. You can also view payment arrangements.



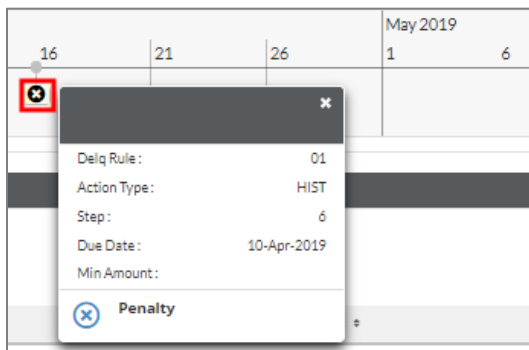
Collections

Displays past and future delinquency events for the account, including past due open items, collection service orders, and payment arrangements.



The **Collections Timeline** displays icons that represent delinquency information (penalties, credit hits, and service orders) by date range.

- To view more details, click the icon.



- To scroll through the calendar, click and drag the calendar left or right.
- To zoom in or out on a calendar area, scroll your mouse wheel up or down.

Past Due Open Items displays as a list that can be sorted by Due Date, Rate, and Balance. The cog icon shows a list of displayed columns; deselect columns you do not want to view.

Customer Search

There are two methods of searching for an account: **Simple Search** and **Advanced Search**. BannerCX defaults to Simple Search.

Simple Search

Use the Simple Search to quickly search basic criteria.

1. On the Dashboard Locator view, open the **Search type** drop-down list and click to select the criteria you want to search on. (This field defaults to the last search type selected.)

When using **Street Name**, consider these tips:

- Do not enter the street name suffix or prefix
 - Do not enter the pre-direction or direction
2. In the **Search for** field, type your search term(s).

If you aren't sure of the exact name or spelling, try a wildcard. Use % to represent zero, one, or more characters before, after, or in between a search term.

Examples:

- Type **%sharon** to return street names ending with **sharon**
- Type **sharon%** to return street names beginning with **sharon**
- Type **shar%n** to return street names of **sharn, sharon, sharen, sharin, sharun, sharan**

Include a street number to narrow your search further.

- Example: Type **543 shar%**

3. Click **Search**. Results will appear in the Account List.
 - To see information about the account/customer, click on the row.
 - To view accounts in your recent searches, click the down arrow to the right of **Search** and select **Recent Accounts**.

- To view accounts associated with a specific customer that is already displayed, click the down arrow to the right of Search and select **Related Accounts**. (This is similar to the **More Accounts** feature in Banner 4.3.)

A screenshot of a search interface. At the top, there is a green 'Search' button with a dropdown arrow and a 'Clear' button. Below the 'Search' button, a dropdown menu is open, showing two options: 'Recent Accounts' and 'Related Accounts'.

- To clear the search fields and create a new search, click **Clear**.

Advanced Search

Use the Advanced Search feature to perform a detailed search, including on more than one field.

- On the Dashboard Locator view, click **Advanced Search**.

A screenshot of the 'Advanced Search' form in the 'Locator' view. The form is organized into several sections: 'Customer' (Last name, First name, Middle name, SSN/SI), 'Area' (Area, Contact Number, Driver's License), 'Premises' (Street #, Pre-Dir, Street Name, Suffix, Post-Dir, Unit Type, Rate/Jurisdiction, City, State, Zip/Postal Code), 'Account' (Customer Code, Premises Code, Previous Account, New, Active, Final, Inactive checkboxes), and 'Other' (Meter Serial Number, Last Name Soundex, Street Name Soundex). At the bottom, there are 'Search' and 'Clear' buttons.

- Enter your search criteria in the appropriate field(s)

To get accurate results, at a minimum, enter at least one of the following data fields:

- Premises Code
- Customer Code
- Last Name
- Street Name and City
- Street Number and Street Name
- Street Name and Zip Code
- Phone Number
- Meter Serial Number
- Parcel Number

- Click **Search**. Results will appear in the Account List.
 - To return to a simple search, click **Simple Search**.

View an Account

Using your preferred search method, open the account you want to view. Once an account is selected, a series of Account Focus Panels and Notification Tiles displays to provide a summary of the account. (These replace the “portlets” in Banner 4.3.)

The screenshot displays the BannerCX UMS interface. At the top, there are six Account Focus Panels: CUSTOMER, PREMISES, ACCOUNT, SERVICES, SERVICE ORDERS, and COLLECTION. Below these are Notification Tiles showing account status and alerts. A red box highlights the 'Panel Controls' area. The main section shows a search bar with 'Customer Code' and '1234', and a table of search results.

Customer	Premises	Name	Address	City/ST/Zip	Status	Bad Debt	Rate Juris	Parcel ID
1234	74380	HAWKS, JOHN C	7507 THORNCLIFF DR	CHARLOTTE NC 28210	I		ALL	17321602
1234	316818	HAWKS, JOHN C	10031 ORCHARD GRASS CT	CHARLOTTE NC 28278	A		ALL	19947707
1234	180348	HAWKS, JOHN C	12343 AUTUMN BLAZE DR	CHARLOTTE NC 28278	I		ALL	19963204

The **Account Focus Panels** display account summary information at the top of the screen as well as links to related information.


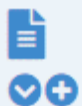



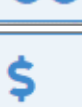
Customer	Includes customer name, code, social security number (or federal identification number), spouse's name and social security number (if applicable), contact phone numbers, email. <ul style="list-style-type: none"> Click panel heading to go to Customer Maintenance.
Premises	Includes premises code and address, tax Jurisdiction, rate jurisdiction. <ul style="list-style-type: none"> Click panel heading to go to Premises Maintenance.
Account	Includes account status, established date, company code, bills, payments, adjustments, discounts, current balance, unbilled charges, account balance. <ul style="list-style-type: none"> Click panel heading to go to Account Maintenance. Click Current Bal to go to current Balance Detail Query to see past due balances. Click the Billed [date] link to go to Bill History Query. Click Payments to go to Payment Distribution Query. Click Adjustments to go to Adjustment Query. Click Current Bal to go to Current Balance Detail Query.




Services	Includes the services for the focus account and the associated status for each. <ul style="list-style-type: none"> Click panel heading to go to Service Maintenance. Click a service to view information about that service.
Service Orders	Includes each service order and number, date, status. <ul style="list-style-type: none"> Click the down arrow to sort by status (e.g., Closed, Open, etc.). Click panel heading to go to Service Order Maintenance. Click an item in the list to view service order details.
Collection	Includes credit rating, pay by check, penalty exempt, bad debt exempt, total past due amount, unbilled penalties amount, unapplied payments amount, total delinquent amount, and any applicable delinquency codes. <ul style="list-style-type: none"> Click panel heading to go to Delinquency History Query. Click an item in the list to view details about the delinquency.

The **Panel Controls** can be used to collapse the panel (▴) and to refresh (↻) panel content.

Notification Tiles

These tiles provide an at-a-glance view of pertinent account details that may need immediate attention.


 <p>AGED AR: 0-30 days:.....\$0.00 31-60 days:.....\$0.00 61-90 days:.....\$0.00 91+ days:.....\$579.81</p>	Aged AR
 <p>NOTES Date/Type: 07-NOV-2019/311CSR Note Text: RECEIVED VIRTUAL REPAIR INVOIC...</p>	Note Summary
 <p>COMPLAINT #979292 - High Bill Investigation (HIGH) - Closed Closed: 07-SEP-2012 Service:</p>	Complaint
 <p>BAD DEBT Total Recoverable Balance: \$213.26 Agency: Unassigned</p>	Bad Debt
 <p>PAYMENT ARRANGEMENT Standard Total: \$412.07</p>	Active Payment Arrangement
 <p>AGENCY ASSISTANCE Agency: CAM Promise Balance: \$100.00</p>	Energy Assistance

   <div style="text-align: right;"> LOAN #1 - Water Capacity - 5% Interest (WPS) Monthly Payment: \$8.56 Unpaid Balance: \$2.00 </div>	Loans
--	-------

You can also jump directly to the associated screen to make changes or view existing information.


Click  to view details or  to add or edit a record.

Navigate Forms

- Required fields are indicated by an asterisk (*) and a blue background.
- Gray fields usually cannot be edited.
- When you see the Lookup button () beside a field, you can click the button to find the value. If you already know the value, however, you can enter it without looking it up.
- To move from field to field, either use your mouse or the **Tab** key.

Do not press **Enter**. On forms, the **Enter** key is a shortcut for the **Save** button. If you press **Enter**, BannerCX will display this message:

Save Record?
✕

 Are you sure you want to save this record?

No
Yes

Click **No** to close the message and return to the form for completion.